City of Franklin Request for Qualifications

Purchasing Office Solicitation No.: 2014-019

1. Solicitation identified: This Request for Qualifications applies to the following procurement:

   professional master planning services for development of a comprehensive parks & recreation 10-year needs assessment

   Purchasing Office Solicitation No.: 2014-019

2. Legal notice publication date: **March 6, 2014**

3. Request for Qualifications release date: **March 7, 2014**

4. Deadline for optional submittal in writing of questions seeking to revise or clarify any aspect of this procurement solicitation: **April 1, 2014, 2:00 p.m. Central Time**

5. Response submittal deadline and scheduled opening: **April 10, 2014, 2:00 p.m. Central Time**

6. Tentative date of release of City's tabulation of response submittals received and notice of intent to award: **May 23, 2014**

7. Tentative date of award: Meeting of Board of Mayor and Aldermen at which is tentatively scheduled to be awarded the selection of the best qualified responsive and responsible potential service provider: **June 10, 2014**

8. Objective: To secure, by means of a competitive procurement process, the selection of the best qualified responsive and responsible potential service provider to furnish all labor, materials and means necessary to render the services anticipated by this procurement solicitation. See the accompanying Instructions for Response Submittal for additional information and instructions.

9. Exceptions:

   a. In order to avoid the need to take an exception to this procurement solicitation, potential service providers may request revisions to the procurement solicitation prior to the deadline for optional submittal in writing of questions seeking to revise or clarify any aspect of this procurement solicitation. See the accompanying Instructions for Response Submittal for contact information.

b. Any deviation or variance from this procurement solicitation shall be identified by the potential service provider as an exception.

c. Any exception to this procurement solicitation shall be listed in detail, in a separate document to be prepared by the potential service provider, any and all aspects of the City's procurement solicitation to which their response submittal takes exception, such listing to include a description of exactly how such exceptions deviate from the City's expectations as expressed and implied by the procurement solicitation, and such listing to indicate why such exceptions should be judged by the City to meet or exceed those expectations. Any and all exceptions to this procurement solicitation which the City, in its sole discretion, deems not to meet or exceed the City's intention as expressed and implied by the procurement solicitation shall be considered by the City as a factor in the award selection criteria.

10. General terms and conditions:

a. Proposed pricing: Any proposed pricing, if solicited, shall include all equipment, labor, materials, permit(s), freight and required insurance to render the specified service(s).

b. Delivery terms: As a matter of practice, the City of Franklin expects vendor to ship any and all deliverables FOB destination, freight prepaid and added. The City's preferred delivery terms, as described in the preceding sentence, are offered to the potential service provider as a condition of award. If the City's preferred delivery terms are unacceptable to the potential service provider, then the potential service provider shall indicate on the Response Submittal Form its preferred delivery terms. Delivery terms may be a factor in the City's selection criteria. Delivery terms are non-negotiable after award is made.

c. Payment terms: As a matter of practice, the City of Franklin pays for goods and/or services only after receipt and acceptance by the City of such goods and/or services, and only after receipt of an accurate, proper, complete and itemized invoice for such goods and/or services, net 30 calendar days from date of delivery or service rendering or date of invoice, whichever is later. The City's preferred payment terms, as described in the preceding sentence, are offered to the potential service provider as a condition of award. If the City's preferred payment terms are unacceptable to the potential service provider, then the potential service provider shall indicate on the Response Submittal Form its preferred payment terms. Payment terms may be a factor in the City's selection criteria. Payment terms are non-negotiable after award is made.

d. Applicable laws and regulations: All applicable federal and state laws, city ordinances, orders, rules and regulations of all authorities having jurisdiction over the specified service(s) shall apply to any quoted purchase pricing, and they will be deemed to be included in the procurement solicitation the same as though they are written out in full herein.

e. Use of subcontractors: The successful service provider (that is, the vendor who is recommended be awarded the purchase) may subcontract any portion of the award but only with the prior consent of the City.

f. Safe work area: The successful service provider will be expected to utilize best practices to minimize the risk of personal injury to the public, City personnel and employees of the service provider and/or the service provider's subcontractors, if any.

g. Other documents to be required of successful service provider: See the accompanying Instructions for Response Submittal for a listing of other documents to be required of the successful service provider.

h. Damages: The successful service provider shall be responsible for any damages it causes in the course of performing the service(s) anticipated by this procurement solicitation, and shall repair or replace any damaged property to the satisfaction of the City of Franklin at its own expense.

i. Terms and Conditions: By submitting its response submittal, the vendor certifies that it has read and accepts all terms, conditions and requirements of this solicitation, including the terms and conditions identified and listed in the City of Franklin Standard Procurement Terms and Conditions attached hereto and hereby incorporated by reference.

j. Refusal to honor submittal: If and after an award is made by the City, if the vendor refuses to execute an agreement or contract or in any other way honor the terms and conditions of its response submittal, then the City shall be entitled to seek compensation for its damages, which may include the cost of conducting a new solicitation.

k. Confidential and/or proprietary information; trade secrets. All contents of all response submittals are subject to public disclosure and shall not contain any confidential and/or proprietary information and/or trade secrets. Further, by submitting its response submittal, the vendor indemnifies and holds the City of Franklin harmless against any loss or damage, including reasonable attorney fees, it may incur as a result of the City's reliance upon the vendor's representation that any documentation and materials supplied by the vendor do not contain trade secrets or proprietary information which is not subject to public disclosure.

11. Detailed requirements: Please note:

- Potential service providers are required to list, in a separate document to be prepared by the potential service provider, any and all aspects of the City's procurement solicitation to which their response submittal takes exception, to describe in that document exactly how such exceptions deviate from the City's expectations as expressed and implied by the procurement solicitation, and to indicate why such exceptions should be judged by the City to meet or exceed those expectations.

11.1. Overview, intent and objective

The City of Franklin Parks Department is seeking to retain a qualified and competent service provider to prepare a Comprehensive Parks and Recreation Master Plan and Needs Assessment. The City intends for the plan to provide a 10-year vision for parks, recreation, open space and trails, as well as an action plan for implementing this vision. The City intends for the plan to include research, public involvement, and the development of recommendations for all aspects of the City of Franklin Park system, including the park system mission and goals as well as provide a community demand, supply and needs analysis. The City's objective is for the Parks master plan to create a framework for decision-making over a multi-year planning period, and also to provide an update to previous plans and studies and consider the recreation needs and desires of the current and future population of the City of Franklin. The selected consultant or consulting team will be expected to work closely with the Franklin Parks staff and will have proven experience and knowledge in park and recreation planning, project management, and effective public involvement. See the accompanying Instructions for Response Submittal for additional information.

11.2. Background

The City of Franklin Parks Department represents one of the most unique park and recreation agencies in the State of Tennessee. Firms are encouraged to visit the Parks Department's webpages on the City's website at www.franklintn.gov and learn more about the City Parks Department's diverse offerings.

The City of Franklin currently has 740 acres of parkland with 343-acres unfinished and 6.5 miles of greenway or multi-use pathways along the river/tributary or roadways throughout the city, with variances in the physical character of the parkland such as topography, soils and vegetation. The Franklin park system may be further categorized as follows:

Passive	72 acres
Historic	482 acres
Active	186 acres
Greenway / multi-use connectivity trails	6.5 miles

11.3. Project purpose, areas of anticipated recommendations, and goals

11.3.1. The purpose of this project is, through public workshops, surveys, and research, to complete a Comprehensive Parks, Recreation Open Space and Trails Master Plan assessing the current and future recreational needs of the City of Franklin Parks system, as they relate to the mission of the agency, in order to better plan, fund, manage and develop parks, facilities, trails and programs.

11.3.2. The City anticipates that the Master Plan will make recommendations in the following areas:

11.3.2.1. Park System Mission and Goals:

11.3.2.1.1. Franklin Parks Identity and Mission

11.3.2.1.2. Affirmation of Goals and Objectives

11.3.2.1.3. Demographics Analysis

11.3.2.1.4. Recreation Trends Analysis

11.3.2.1.5. Park Classification System Recommendations

11.3.2.1.6. Natural and Historic Resource Management Recommendations

11.3.2.2. Community Demand, Supply and Needs Analysis:

11.3.2.2.1. Recreation Facilities

11.3.2.2.2. Recreation Programs – Special Events

11.3.2.2.3. Trails

11.3.2.2.4. Open Space (Types of Parks: Passive, Historic or Active= Organized Sports)

11.3.2.3. Ten-Year Plan for Growth:

11.3.2.3.1. New Park Master Plan Priorities and Recommendations

11.3.2.3.2. Existing and Future Park Expansion and Improvement Priorities and Recommendations

11.3.2.3.3. Trails Master Plan Update

11.3.2.3.4. Open Space Acquisition Priorities and Recommendations

11.3.2.3.5. Budgeting and Funding Priorities and Recommendations (Including Personnel & Equipment)

11.3.2.3.6. Parks Capital Improvement Plan Priorities and Recommendations

11.3.3. The City's goals for this project are as follows:

11.3.3.1. To identify and serve current and future park and recreational needs through an integrated park system that provides adequate open space, recreational services and facilities, trails, and stewardship of natural and historic resources, by:

11.3.3.1.1. Establishing a park classification system and appropriate management recommendations reflecting current and future growth by the park system

11.3.3.1.2. Identifying the future quantities and locations of open space acreage needed to satisfy the current and future recreation needs of the City of Franklin

11.3.3.1.3. Ensuring the long term protection, preservation and sustainability of park resources

11.3.3.1.4. Promoting the conservation of natural and cultural resources through parkland acquisition, stewardship, and environmentally sensitive planning

11.3.3.1.5. Providing facilities that promote sustainability goals by developing environmentally sensitive design principles

11.3.3.1.6. Identifying historic preservation management objectives

11.3.3.1.7. Identifying natural resource management objectives

11.3.3.2. To provide an accessible and diverse offering of park and recreation facilities and programs to all residents of the City of Franklin, by:

11.3.3.2.1. Defining the role of the Franklin Parks in contributing towards quality of life in Williamson County

11.3.3.2.2. Identifying and prioritize recreation facilities needed at existing and future parks

11.3.3.2.3. Providing for current and future park and recreational needs through facility expansion at new and existing sites, and through optimizing use of all existing facilities

11.3.3.2.4. Identifying and prioritize recreation programs and special events needed throughout the park system

11.3.3.2.5. Educating and promote the stewardship of the City of Franklin's historic, cultural, and natural heritage

11.3.3.2.6. Promoting improved access to waterways

11.3.3.2.7. Matching community needs with park facilities and services

11.3.3.3. To establish an updated greenways and trails master plan, including trails for recreational use within park facilities, as well as Citywide greenway corridors and linkages, by:

11.3.3.3.1. Reviewing the current Greenway and Open Space Master Plan and develop a network of pedestrian and bicycle paths, nature trails, greenways and linear linkages that connect to parks and popular destinations, including connections of historical public and private parks

11.3.3.3.2. Identifying stakeholders and encourage cooperative agreements and partnerships with other governmental jurisdictions to achieve a city wide trail system

11.3.3.3.3. Providing priorities for a capital improvement plan for yearly design and construction

11.3.3.4. To develop an action plan, that is, a strategy for prioritizing, phasing, funding, and accomplishing the identified needs, by:

11.3.3.4.1. Providing the opportunity for community involvement in the planning, construction, and programming of recreation and park facilities

11.3.3.4.2. Identifying a strategy for maintaining and developing partnerships to implement goals

11.3.3.4.3. Identifying a strategy for ongoing growth and improvements to the park system through the Parkland Dedication Municipal Code Section. Establish a nexus for funding new and unimproved parks and greenways with fees received through the existing Parkland Dedication ordinance

11.4. Anticipated project schedule; anticipated scope of work and deliverables

11.4.1. The City anticipates the project to take approximately ten months to complete and to include the following phases: project initiation and administration; research and analysis; outreach and needs assessment; and recommendations.

11.4.2. The City anticipates the following scope of work and deliverables:

11.4.2.1. Project initiation and administration. The consultant will conduct meetings and communicate with Franklin Parks staff on a regular basis throughout all phases of the project, to review and comment upon work products, refine plan objectives, and develop recommendations. Deliverables will include: final work plan, process flowchart, project timeline, staff committee meeting schedules, agendas, handouts, meeting reports, website update.

11.4.2.2. Research and analysis. The consultant will conduct both demographics and local research and analysis, review existing documents, and evaluate the park system based on established standards and criteria, to include the following:

1) Existing documents review including population and demographic data (2013 Census)

2) Recreation trends research

3) Level of service standards and criteria

4) Park classification system evaluation

5) Inventory and evaluation

a) Recreation Facilities inventory and evaluation

b) Recreation Programs-Special Events inventory and evaluation

c) Trails inventory and evaluation

d) Open Space inventory and evaluation

e) Natural and historic resources inventory and evaluation

6) ArcView Versions 10, 10-1, & 10-2 and CAD compatible mapping

Deliverables will include: Maps, tables and reports reflecting all inventories and evaluations.

11.4.2.3. Outreach and Needs Assessment. The consultant will conduct a well-publicized public involvement process using various media and forums to reach as many citizens as possible, to include the following:

A. Public Involvement

1) Stakeholder interviews

2) Focus groups

3) Public workshops

4) Community survey

B. Public Information

1) Public information displays

2) Press releases

3) Web materials, social media

4) Public presentations

C. Needs Assessment

1) Recreation Facilities

2) Recreation Programs

3) Trails

4) Open Space

Deliverables will include: Community involvement plan, agendas, handouts, graphics, survey instruments, survey report, workshop reports, interview instruments, PowerPoint presentations; reports of findings from meetings, workshops, interviews; public information plan, graphic and text materials for distribution, website update.

11.4.2.4. Recommendations. The consultant will provide a draft report, making recommendations in all areas for review. The final report will incorporate the following:

A. Draft recommendations

1) Park System Mission and Goals

a) Park system identity and mission recommendations

b) Goals and policies recommendations

c) Level of service standards recommendations

d) Park classification system recommendations

e) Natural and cultural resource management recommendations

2) Community Demand, Supply, and Needs Assessment Report

a) Park facility evaluation

b) Recreation program evaluation

c) Trails evaluation

d) Open space evaluation

3) Ten-Year Plan for Growth:

a) New Park Master Plan Priorities and Recommendations

b) Existing and Future Park Facility Expansion Priorities and Recommendations

c) Recreation Program Expansion Priorities and Recommendations

d) Trails Master Plan Update

e) Open Space Acquisition Priorities and Recommendations

f) Budgeting and Funding Priorities and Recommendations

B. Final Comprehensive Master Plan Report

C. Presentation to the Public and Board of Mayor and Alderman

Deliverables will include: Community Needs Assessment Report, draft and final document including maps in ARCVIEW compatible format, 10 printed copies, 5 CD copies, including all graphics.

11.5. Evaluation criteria

The following criteria shall be used to evaluate response submittals:

1) Factor 1- Corporate Experience: Consulting Team (25%)

Basis of Evaluation: The submittal will be evaluated to determine if the firm has demonstrated the necessary corporate experience in performing Professional Master Planning.

2) Factor 2-Past Performance: Consulting Team (25%)

Basis of Evaluation: The degree to which past performance evaluations and all other past performance information reviewed (e.g., performance recognition documents, and information obtained for any other source) reflect a trend of satisfactory and/or outstanding level of performance considering:

a) A pattern of successful completion of tasks;

b) A pattern of deliverables that are timely and of good quality;

c) A pattern of cooperativeness and teamwork at all levels

d) A respect for stewardship of City of Franklin funds

In addition to the above, the City of Franklin Parks Department may review any other sources of information for evaluation past performance. Other sources may include, but are not limited to, inquiries of owner representative(s), and any other known sources not provided by the respondent. While Franklin Parks Department may elect to consider data from other sources, the burden of providing detailed, current, accurate and complete past performance information rests with the respondent. Based on the trend and satisfactory and/or outstanding level performance may be rated higher.

The distinction between corporate experience and past performance is corporate experience pertains to the types of work and volume of work completed by a service provider that is comparable to the types of work covered by this requirement, in terms of size, scope, and complexity. Past performance relates to how well a consultant has performed.

3) Factor 3- Project Approach and Performance Differentiators (30%)

Basis of Evaluation: The submittal will be rated higher if it meets and/or exceeds the following items:

Capability to provide professional master planning services, describe how submittals will be presented during each phase for approvals, describe firm's ability to provide realistic budgets and implement cost controls throughout a project, knowledge of local site conditions and applicable regulatory requirements and the ability of the firm to ensure timely response to requests for on-site support.

4) Factor 4- Capacity (20%)

Basis of Evaluation: The submittal will be evaluated to determine if it meets or exceeds the requested schedule, explain the plan to meet or exceed the identified schedule, and provide a critical timeline for a successful project may be rated higher.

11.6. Information required to be included in response submittal

The following information shall be included by the potential service provider in its submittal in order for it to be considered responsive:

1) Factor 1 – Corporate Experience to provide a Comprehensive Needs Assessment:

a) **Consulting Team -** Submittals shall identify the Principal-in-Charge and Project Manager for this project. Submittals shall also provide a statement of the firm's commitment that the identified individuals will be involved throughout the entire project and must address, at a minimum: The organizational strength and stability of the responding firm is an important component to the selection process. The experience of work by the firm, which was obtained by personnel no longer with the firm, and therefore, not available for work the project, is of no interest to the City of Franklin and shall not be submitted in the response when providing the firms qualifications. City of Franklin evaluators will only consider firm projects that were presided over by project members who still work for the firm in the office submitting a response. Failure to properly identify work accurately may disqualify the submittal. Describe what uniquely qualifies your team to perform the requested work associated with this Master Plan. Provide an overview of the project team and a description of key personnel that will be assigned to the project. Include their professional qualifications and experience (projects and dates), and their role in similar projects, including sub-consultants. Describe the role that each of the sub-consultants will have in developing the master plan. Provide an organizational chart showing the team structure.

b) **Relevant Experience** - Please list no less than five projects of similar scope that have been accomplished by the consulting team and project manager who will be assigned to this project. Work performed by employees who are no longer with the firm will not be considered. Include the client name, location, common issues, and services provided. Plans and illustrations are welcome. Include contact information for five client references.

Provide documentation of the firm's capability and experience. Include:

- Demonstration of firm's ability, including general consultants with specialties such as professional master planning to perform the indicated services.
- Organization Chart of the identified team including consultants, showing member names.
- Project Team

Submittal shall clearly address the following:

- Names, titles and responsibilities of those who would work on this project.
- Resume of each project team member that will be assigned to this project to include education and related experience.
- Applicable Professional Registrations.
- Longevity with firm.
- Membership in professional organizations
- Description of previous work specific to professional master planning.
- Professional awards received by the individual or projects where the individual played a key role.
- Detail individual's experience in the capacity of Project Manager that will be assigned to this project - highlighting experience with similar projects.
- Provide the title of the referenced project, year work was done, name of the client and the name, address and telephone number of a contact person knowledgeable of that individuals' role on the project.

For the Consulting firm's office (if any sub-consultants – separately) to provide these services:

- Number and discipline of Professional staff employees
- Number of Non-Professional technical staff employees
- Total number of staff, including administration, employees
- Firm's background including organizational structure and years in existence.
- Firm's memberships in professional organizations
- Number of firm's billings for each of the past five years.
- Percentage of fees derived from recreational related work.

Describe what, in your opinion, your firm has that is unique and of value to the City of Franklin Parks System and how that might impact how you intend to complete the scope of services anticipated by this procurement solicitation.

- Submittals – The selected firm must address their ability to provide the documents requested by the City in its submittal. The selected firm will be required to prepare all maps in ARCVIEW compatible, 5 copies of all documents on compact disks and 10 printed copies. Submittal must clearly indicate any and all anticipated costs associated with plan submittals.
- Sub-consultants/Studies: Submittals shall include a list of all sub-consultants the firm is recommending for the project. Any and all fees associated with subconsultants will be the responsibility of the selected

firm to administer and will become a part of the contract and invoiced through the prime consultant.

c) **Other Information**. Please submit one (1) example of a Comprehensive Parks and Recreation Master plan, as well as any other information you deem necessary to meet the requirements of this request for qualifications.

2) Factor 2 – Past Performance

a) Provide recent (within the past 3 years) experience of the team members, individually and collectively as a total team in (provide reference contacts with current phone number) and a listing of key members of the firm, their experience with similar projects and their role in the projects, a listing what your firm offers that others may not, relevance and appropriateness of firms' expertise and park and recreation master planning experience. Submittal must address the:

- Specific experience of a comparable nature.
- Specifics regarding the efficiency and accuracy of cost estimates for any previous comparable projects.
- The Consulting firm is encouraged to submit any other information they believe will enhance their position in the evaluation criteria.
- Submit any other information to enhance your position in the evaluation criteria.
- Include experience in park and recreation master planning and other elements anticipated by this solicitation as deemed applicable to demonstrate firm/personnel qualifications.
- Names, titles and responsibilities of those who would work on this project.
- Resume of each project team member that will be assigned to this project.
- Applicable professional registrations.
- Longevity with firm.
- Membership in professional organizations.
- Description of previous work specific to park and recreation master planning experience. Also, provide description of work relating to similar projects and provide information of other related experience, specifically dealing with need assessments and parkland dedication municipal ordinance implementation.
- Detail individual's experience in the capacity of Project Manager that will be assigned to this project - highlighting experience with similar projects.
- Provide the title of the referenced project, year work was done, name of the client and the name, address and telephone number of a contact person knowledgeable of that individual's role on the project.

3) Factor 3 – Project Approach and Performance Differentiators

a) Provide a description, specific example(s), and reference firms contact information and phone number that demonstrates the firm's capabilities in the following areas: Indicate the individual in the firm who was responsible and their anticipated involvement in this project.

- Capability to perform park and recreation master planning
- Unique qualifications and /or accomplishments, if any, that differentiate your firm and anticipated project manager as being uniquely qualified for performing the anticipated services, specifically need assessments for a growing community and best practices and solutions for implementation of a parkland dedication municipal ordinance.

b) Describe how submittals will be presented for approvals.

c) Describe firm's ability to provide realistic budgets and implement cost controls throughout a project.

d) Provide detailed description of your firm's approach in park and recreation master planning.

e) Provide the reasoning why your team should be selected.

4) Factor 4 – Capacity

a) Schedule. Team's ability to meet the identified schedule for completion, including all owner reviews.

b) Time schedule for completion. Describe your firms approach to the project timelines and scheduling with using in any appropriate spreadsheet form.

11.7. Insurance Requirements

Prior to award of the procurement by the City, the successful service provider shall provide one or more unexpired certificates of insurance providing evidence of the following minimum types and limits of insurance coverage:

Type of Coverage	Limits of Coverage	Certificate of Insurance
Workers Compensation	Statutory limits	Certificate Holder only
Employers Liability	$1,000,000 Bodily Injury Each Accident $1,000,000 Policy Limit Bodily Injury by Disease $1,000,000 Each Employee Bodily Injury by Disease	Certificate Holder only
Professional Liability	$2,000,000 Combined Single Limit	Certificate Holder only

If and when insurance coverage documented by the certificate(s) of insurance referenced above expires before the expiration of any specified term of award, including any extensions thereto, or the delivery and acceptance of the ordered products and/or services, then the successful service provider shall provide, prior to said insurance coverage expiration, one or more unexpired certificates of insurance that indicates the new date(s) of insurance coverage expiration and that meets or exceeds the insurance requirements as specified above.

In the event that insurance coverage documented by the certificate(s) of insurance referenced above is materially modified or canceled before the expiration of any specified term of award, including any extensions thereto, or the delivery and acceptance of the ordered products and/or services, then the successful service provider shall notify the City, within three (3) calendar days of knowing or being notified itself, of any such material modification or cancelation.