

# OSWEGOLAND PARK DISTRICT REQUEST FOR PROPOSALS COMPREHENSIVE MASTER PLAN

**Proposals must be received by 4:00 p.m. CST on April 18, 2018**

**Oswegoland Park District  
313 E. Washington St.  
Oswego, IL 60543  
Attention: Rich Zielke  
630-554-4432  
rzielke@oswegolandpd.org**



## **Introduction**

The Oswegoland Park District is requesting proposals from qualified consulting firms to provide professional services to the District to develop a Comprehensive Master Plan. The selected firm will have proven experience and knowledge in park and recreation planning, project management and effective public involvement processes and work closely with District staff and the Park Board in preparing the Plan.

The Comprehensive Master Plan will drive District long-range planning and direct decision-making and resources toward a clearly defined vision for its future, including development and redevelopment of the parks, facilities, open space and recreation system over the next five years. The planning process will consist of the following components: needs assessment, visioning, identifying and evaluating community needs, priorities and opportunities, and creating a phased implementation and financial plan. The firm will create a document which summarizes the planning process, data collected, the analysis of forecasted needs and implementation strategies and present it to the Park Board for review and approval.

## **Background**

The District utilizes long-range planning to define a consistent future vision and strategic priorities as it forces the organization to imagine the desired future of its services, recognizing the realities of the external operating environment and developing an action plan to make the desired future a reality. The Board conducted its last attitude and interest survey in 2014, capital improvement plan in 2012, golf course master plan in 2009, parks master planning process in 2008, and strategic plan in 2017. The key factors to all District long-range planning process include the following:

- Conduct a needs assessment process to analyze community park and recreation needs and interests and identify the gaps to be addressed to meet those needs and interests.
- Assess the future vision of the organization and determine the strategic priorities to achieve that vision.
- Engage stakeholders in the planning process to build consensus and support for the effective development and implementation of long-range plans.
- Foster an awareness of the organization's presence and impact on the community.
- Develop a "living document," which reflects the outcomes of the process and provides clear direction on actions to be taken to address strategy and provides a foundation for the development of all other planning and operating documents (e.g., budget, capital, facility and marketing plans).

- Ensure the most effective use of the organization’s resources by focusing decision making and spending on strategic priorities.

**2008-17 Master Plan:** Oswegoland Park District staff and Board members initiated a strategic planning process to integrate public need, recreation trends, existing resources (both capital assets and funds), a balanced approach to habitat and human priorities, and planning visions. The goal was to build, through wisely commissioned tools and public input, a guideline for future park development, acquisition, public needs assessment, and the effective utilization of existing parks.

**2017-2021 Strategic Plan:** In 2015, the District hired a firm to assist with developing the District's Strategic Plan with the goal of creating a community-based vision for the future of park and recreation services for the communities we serve. To prepare for the process, the District conducted a scientific community-wide survey in 2014 to assess the community’s preferences, opinions and interests since the results from the previous survey were no longer reliable. A structured planning process was conducted, including examining the District’s current and future opportunities, external and internal data, feedback on strengths and weaknesses, and issues requiring resolution.

The Board approved the District’s 2017-21 Strategic Plan in August, 2017 and is being used to guide District goals, work plans and financial priorities. To ensure that the Plan remains relevant and effective as a long-range planning tool, the Board and staff will review and revise, as necessary, the District’s Strategic Plan prior to staff developing the proposed budget.

**Update to the Comprehensive Master Plan:** With the Comprehensive Master Plan requiring updating in 2018-19 and a needs assessment, visioning, prioritization of future needs and action planning being essential parts of both processes, the District will be hiring one planning firm to assist with conducting a joint comprehensive master planning process, which includes a needs assessment to guide these plans. The reasons for and benefits of conducting a joint process include the following:

- Lead to an effective alignment of the goals;
- Provide for the timely collection of needs assessment data and the review of this data during the development of the Comprehensive Master Plan rather than using data from a previous planning process to drive one of the Plans;
- Allow for a “whole systems” planning approach, which encompasses more than a review of park and facility needs, but also operational and funding needs, which is critical in the District’s current economic, political, and operating environment;
- Result in one action plan, which provides focus for financial and work planning; and
- Maximize District resources, including Board and staff time with a shorter, less duplicative planning period.

**Community and District Profile**

Oswego is a community that is rich in history, dating back to its settlement in the 1830s. Oswego is a highly livable and sustainable community that has experienced robust growth since the 1990 U.S. Census. As Oswego continues to grow, its location on two rail lines, three state highways, and two U.S. highways, along with its continuing economic development and growth, the village is experiencing a period of rapid economic and population growth very similar to that which took place right after Judson and Arnold laid out their new town 180 years ago.

The economic downturn had an effect on the community in 2008 however, while slow, there has been an upturn for several years running. Residential growth has continued to increase and several new residential and business developments are in the planning process.

In September of 2016, the Village of Oswego approved a TIF district encompassing its downtown to fund public improvements to incentivize new development. Shodeen Inc. will bring a mixed use building comprised of residential and commercial property.

Opportunities for new development exist on the Orchard Road and Route 34 corridors, with approximately 400 acres of land designated for industrial and office expansion. This includes the site for a future Metra Station along the BNSF line that would bring visitors to the Oswegoland area for employment, shopping and to enjoy the parks, facilities, and special events.

### ***Oswegoland Park District***

In 1950, the residents of Oswego Township created a unit of local government to provide for the community's recreational and park interests. An at-large community-elected Board of Commissioners, consisting of five members each serving six years, constitutes the governing Board of the Oswegoland Park District. The Commissioners appoint an Executive Director to carry out the policies of the Board and oversee the day-to-day operations of the District. The District develops and maintains parkland, provides recreational programs, and develops and operates multiple recreational facilities. The Park District employs 51 full-time, 750 part-time and seasonal employees.

The Oswegoland Park District is located in the northeastern section of the State of Illinois, approximately 40 miles west of Chicago and encompasses an area of 38 square miles. Originally located within Kendall County, its borders have expanded into a small portion of Will County. The District serves a population of approximately 55,000 residents. The roughly 20,000 households include all of the Village of Oswego and Boulder Hill, the surrounding countryside of Oswego Township, and parts of Montgomery, Aurora, and Plainfield.

The District owns 64 parks, greenways, and natural areas, covering 1,123 acres. Facilities include three recreation centers, an early childhood learning center, two outdoor swimming facilities, a splash pad, a 160-acre 18-hole golf facility with pro shop and restaurant, a historical school/museum, and an administration office building. In addition, but not limited to, the District offers 33 playgrounds, 31 shelters, nine sand volleyball courts, four full court basketball courts, 27 half-court basketball courts, 10 ball fields, an 18-hole disc golf course, 9 outdoor tennis courts, two skate parks, seven sled hills, eight pickle ball courts, three inline hockey rinks, numerous soccer game fields, and maintains 20 miles of walking/biking/jogging trails. Within these facilities, District staff offers more than 2,700 recreation programs throughout the year to its residents and other guests with over 26,000 participants in 2016. The District is also a member of the Fox Valley Special Recreation Association, which provides recreational services for children and adults with special needs.

To provide the diversity of facilities and programs highlighted in this section and maintain a healthy financial condition, the District's overall philosophy is to project revenues and expenses conservatively, and to use sound financial planning to achieve the Board's priorities, utilize existing reserves to maintain assets, take steps and allocate resources to address competition, attract and retain customers, and provide a balanced level of services and programs expected by the community. Furthermore, staff recognize that to ensure long-term financial sustainability, the District must proactively divest in those programs with declining participation, and those that do not or cannot consistently reach established revenue benchmarks, while putting resources into areas with potential growth. As a result, the District has had the fiscal agility to use reserves to address capital project needs, maximize and grow revenue, ensure adequate staffing, and undertake key Strategic Plan initiatives for long-term success.

To continue maintaining its aging infrastructure and offer the programs, services and new facilities and amenities the community desires, the Board and staff must continue to make measured decisions, balancing future community needs against the District's sound fiscal condition, including implementing the cost recovery models developed during the program planning process, and determining realistic and financially feasible future priorities during the next comprehensive and strategic planning process.

### **Scope of Work**

The specific work to be undertaken by the successful firm for the comprehensive master planning process is described in this Section, and respondents should include in their proposals how they will assist the

District with completing this work. The work described in this Section is considered to be the minimum required to complete this process. In their submittals, firms should propose additions or edits to this scope that lend to the best process. Following the firm selection process, a meeting will be held with the successful firm to negotiate the final scope of work and a contract for services. Therefore, the District reserves the right to make revisions to the final scope of work.

### ***Project Kick-off***

The first step in the project will be to hold an onsite meeting with District staff to establish objectives for the project, including confirming roles and responsibilities and finalizing the project methodology, scope of services, timeline and format and content of deliverables.

### ***Conduct a Needs Assessment***

A key component in creating the Plan will be a needs assessment process that taps the opinions and ideas of the community, Park Board and staff and includes a comprehensive inventory of the current state of the District, including its financial condition, operations, park system, facilities, programs and services. The needs assessment also entails a review of current and projected demographics, current planning standards, regional and national trends and how facilities owned by other entities factor into the park and recreation needs of the community. It will provide the data and information necessary to evaluate how District park and recreation facilities meet current and future needs and whether modifications and/or additions will be required. An overview of each facet of the needs assessment is as follows:

### ***Develop and Implement Public Involvement Strategy***

The planning process must result in a shared, clearly defined vision for the District driven by input from the community. Public involvement is extremely important to the District and informs decision making processes. The successful firm will propose a robust and innovative public outreach strategy that describes how the community, staff and Board will be provided opportunities to participate in the development of the Plan. In their submittals, firms should at a minimum provide the following:

- Identify and describe a comprehensive strategy and methodology for citizen, participant and stakeholder involvement (e.g. proposed outreach process, methods of outreach, outreach tools, anticipated schedule)
- Ensure the residents, user groups and other stakeholders are provided an opportunity to participate in the development of the Plan
- Act as professional facilitators to gather specific information about services, use, preferences and any agency strengths, weaknesses, opportunities and threats
- Provide well-organized and directed activities, techniques and formats that will ensure that a positive, open and proactive public participation process is achieved
- Provide written records and summaries of the results of all public process and communication strategies
- Develop and manage any online public involvement tools and data
- Throughout the entire process, help to build consensus and agreement of the plan and if consensus is not possible, provide information for informed decision making for the staff and Park Board

### ***Collect and Analyze Data***

- Review current long-range plans and related documents such as, but not limited to, the District's 2017-21 Strategic Plan, 2008-17 Master Plan, 2018 Budget, 2017 Comprehensive Annual Financial Report (CAFR), and Long-range Capital Plan.
- Develop and administer a District-wide statistically-valid community needs assessment survey with a return rate that accurately represents a sampling of the community population to identify community needs and issues on the District's facilities, programs and services. This survey will be used as a baseline to determine needs, desires and willingness to pay

- Collect and interpret demographic characteristics and trends of the District population using information from the US Census Bureau's American Community Survey, tapestry segmentation, regional and local sources, etc.
- Compile data on participation, operations, technology, programming, programming space and land use trends and acquisition opportunities
- Compile an inventory of indoor and outdoor facilities, including capacity of each amenity found within the park system as well as its functionality, accessibility, condition and convenience, etc.
- Review available funding and financing strategies that are options for funding future improvements.
- Develop Level of Service (LOS) standards to meet community needs. Standards should consider geographic distribution of indoor and outdoor facilities and their amenities
- Provide usable and workable definitions and recommendations for designated park and open space with acreages and parameters defined as appropriate

***Determine the District's Strategic Direction and Analysis of Forecasted Needs***

The firm will review needs assessment outcomes with the Board and staff and facilitate a review of the District's strategic direction to identify and affirm the long-range vision for the District. This step of the Plan process is vital for clarifying the District's organizational direction for action planning, decision making, and resource allocation. To determine the District's strategic direction, the firm will assist the District with accomplishing the following:

- Review the District's purpose, aspiration and organizational values
- Conduct a situational analysis and environmental scan utilizing the needs assessment data to determine gaps in what is being provided versus the needs and interests identified
- Develop a list of critical issues and opportunities based on the results of the situational analysis and environmental scan

***Develop Recommendations and Implementation Strategies***

To ensure that the Plan is implementable upon its adoption by the Park Board, it must include realistic, feasible and clearly-defined planning scenarios. Based on the outcomes of the needs assessment and the District's strategic direction, the firm will be expected to develop the following:

- Prioritized recommendations to meet current and future needs through, but not limited to, land acquisition, construction or redevelopment of indoor and outdoor facilities, development of additional recreational amenities, park maintenance, etc.
- Estimates of the capital and operational costs for land acquisition, construction or redevelopment of indoor and outdoor facilities, development of additional recreational amenities, park maintenance, etc. The analysis should be designed to connect with the District's capital plan.
- Recommendations for addressing operations, staffing, maintenance, technology, programming and services and funding needs to support implementation of this Plan.
- Evaluation of the feasibility, cost-effectiveness/return on investment of suggested strategies and recommendations.

***Create Action Plan: Strategic, Capital and Financial***

The firm must develop an action plan which includes strategies, priorities and budget support and funding mechanisms for the short term, mid-term and long term, which were developed during the previous stage in the process. The Action Plan must be a phased with prioritized recommendations and a capital projects prioritization process/ranking system for future strategic investments and level-of-service/reoccurring capital needs.

### ***Final Report and Presentation***

The selected firm shall submit a draft and final report which summarizes the findings and conclusions and includes a clear demonstration that the firm has fulfilled all of the elements contained in the agreed upon scope of work. The Plan must include written goals, plans, objectives and policy statements that articulate a clear vision and “road map” for the District’s future.

The firm will make two (2) on-site presentation to report and summarize findings to the Park Board and staff. The reports must be in an easy-to-understand format with charts, graphs, maps and other data as needed to support the plan and its presentation to the appropriate audiences. The final report must be submitted as follows:

- A color version of the draft Master Plan document consisting of one (1) printed and bound color copy and an electronic copy in a format compatible with the District’s software.
- A color version of the final Master Plan document consisting of fifteen (15) printed and bound color copies, one (1) printed and unbound copy and an electronic copy in a format compatible with the District’s software.

### **Services Provided by Staff and Progress Reporting**

The Oswegoland Park District will assist the firm in managing the operational aspects of the project and coordinating work with the relevant parties. The District will provide overall support for project tasks and, the Superintendent of Recreation will serve as the lead liaison for the project. The Superintendent of Recreation will provide all existing documentation (as requested by the consultant during final scope review) and compile contact information for staff and local organizations. District staff, primarily the Superintendent of Recreation, will also schedule, coordinate the availability of staff based on their work schedules and make all necessary arrangements for meetings and interviews conducted by the consultant during the course of this project.

The firm and the Superintendent of Recreation will hold progress meetings in person or over the phone as often as necessary, but in no case less than once per month until a final plan is approved by the Park Board. The Superintendent of Recreation shall schedule the progress meetings, as necessary, at key times during the development of the Plan. The firm shall provide the Superintendent of Recreation with at least one (1) copy of all completed or partially completed reports, studies, forecasts, maps or plan as deemed necessary by the Superintendent of Recreation.

### **Instructions for Submitting Proposals, Proposal Components and Evaluation Criteria**

All respondents to the RFP must include the items provided in the following list. All the listed items should be addressed completely and should follow, as closely as possible, the order and format in which it is listed below. These categories and criteria will be major considerations in the evaluation and determination of the most qualified and capable firm(s). The sequence of the listing is not intended to reflect the relative weight of each category.

1. Letter of transmittal
  - a. Statement indicating an understanding of the work to be performed and interest in performing the scope of work.
  - b. Discuss consultants’ availability over the next 6-12 months.
  - c. Identification of key contact person for communicating with the District on the proposal and all project-related matters.
2. Qualifications/Project Portfolio
  - a. Areas of specialization.
  - b. Practice philosophy.
  - c. Years in the business and history of firm.

- d. Examples of three (3) to five (5) projects the firm took a lead role in the preparation of a Comprehensive Master Plan and a community-wide scientific survey. The projects should be comparable in complexity, size, scope and discipline (as described in the Scope of Work section) and been undertaken during the past five years.
3. Project Management
    - a. Introduction to the team (all firm staff and sub-consultants assigned to complete work on the project), including resumes for all the key personnel, which provide educational background/training, experience and detailed descriptions of roles played on past projects.
    - b. Services/functional roles to be performed by each team member (including all sub-consultants).
    - c. Location of each team member.
    - d. Availability and commitment of assigned professionals who will undertake the scope of work.
    - e. Technical resources of the firm and any sub-consultants.
  4. Methodology and Process to Complete all Phase of Project
    - a. Describe the vision, strategic overview and approach to the project.
    - b. Express how the components above reflect your qualifications for this project.
    - c. Discuss what parameters you will engage to develop a project that will be creative, logical, and engaging.
    - d. Include detailed descriptions of the procedures and methods you propose to use to complete all tasks within the scope of work.
    - e. Discuss tasks, timelines and anticipated deliverables for each phase of the project.
    - f. Include the proposed process and methods to assure quality, cost, and schedule control.
    - g. Explain in the proposal all supporting studies, models, and assumptions that will be developed or used as part of the study.
  5. References
    - a. List at least three (3) to five (5) references we may contact (preferably from the projects provided in 2(d) of this section that have been undertaken during the past five years) with client contact information (current email and telephone).
    - b. Indicate project names and the personnel assigned to this project (including all sub-consultants) roles and involvement in each project.
  6. Schedule
    - a. Provide a proposed detailed project work schedule with a start date of May 24, 2018 (contingent upon negotiation of a final scope of work); all meetings that need to be scheduled should be built into the timeline (e.g., initial meeting with staff to review project schedule, strategic direction review, presentations of the final report, etc.).
    - b. Include time frames for each major component of the scope of work and target dates for completing each phase of the project.
  7. Fee Proposal - one (1) copy in a sealed envelope (see also Fee Proposal section following this list)
    - a. Include a total "not to exceed" figure for the scope of work (based on the estimated level of effort to be spent on each task).
    - b. Include itemized schedule of all expenses by phase (reimbursable expenses listed separately), including a composite schedule of hours estimated for included tasks.
    - c. Provide hourly rates for all team members, sub-consultants and staff levels.
    - d. Describe the methodology for billing reimbursable expenses (such as travel, production of documents, purchase of data, etc.).
    - e. Describe method for billing additional services beyond the initial scope of work (beyond approved not-to-exceed amount).

*Fee Proposal:* One (1) copy of the cost of services must be included in a **separate, sealed envelope** with appropriate detail reflecting all costs. The firm is required to **separate cost** by the major phases of the process. **Do not include any reference to fees in the body of your RFP response.** Failure to comply with this provision will result in disqualification of your firm. The District reserves the right not to fund any portion of the firm's proposal.

*Understanding and Approach of Scope of Work:* Proposal shall describe the approach to the scope of work described in the Scope of Work section of this RFP, including process and schedule. Firms are encouraged to make suggestions to amend the scope of work to achieve the project goals. This criterion will be evaluated based on the proposer's understanding of the project objectives and ability to demonstrate a process that efficiently and effectively achieves the desired outcomes. Reasoned creativity is encouraged. The District anticipates modifying, where appropriate, the objectives and/or scope of work listed in this RFP based on the firm's experience and expertise in completing similar projects.

*Disclosure:* Proposal will disclose any professional or personal financial interest which could be a possible conflict of interest in contracting with the District. Consultant shall further disclose arrangements to derive additional compensation from various products or services, including financial. The firm must also list all current and unresolved litigations, arbitrations, or mediations of the firm in its proposal.

### **Selection of Consultant**

The Oswegoland Park District will select a firm on the basis of its ability to respond to the Request for Proposal (RFP) requirements, the qualifications and expertise of the team working on this project, past performance on similar projects, the time required to complete project, methodology, firm resources and the firm's willingness to negotiate and execute an acceptable written agreement. The District reserves the right to reject any, some portions of or all proposals and supporting material and to request written clarification of any portion or section of proposals and support materials. The District reserves the right to negotiate with more than one potential respondent after the submission of all proposals. The District also reserves the first right-of-refusal to work with any sub-consultant proposed by the firm.

After a thorough review by District staff of the proposals submitted by respondents to this RFP, a short list will be created of the firms that meet the requirements outlined in this RFP and those firms will be required to make a presentation on their qualifications and proposals to the staff. Based on these interviews, the staff will recommend to the Board the firms that are the best fit for the District and this project. The Board will interview these firms and formally approve the selection of a firm. The Board makes all final assessments and judgments regarding selection.

All proposals will be afforded fair and equal treatment with respect to any opportunity for discussion and revision. Any such revision may be permitted after submission and prior to award for the purpose of obtaining the best and final offer at the discretion of the District. When conducting negotiations, the District will not disclose information from proposals submitted by competing firms.

### **Selection Process Timeline**

The timeline for selecting a firm is as follows:

Deadline for Proposal Submission	April 18, 2018
Firm Oral Presentations/Interviews with the Staff and Board	May 3, 2018
Potential Approval of Firm by Oswegoland Park District Board	May 17, 2018
Project Start Date	May 24, 2018
Complete Project	by April 2019



## **General Requirements of the Selected Proposing Firm**

The selected proposing firm must follow the following general requirements to be hired by the District:

- Enter into a contract with the District and maintain insurance coverage for the duration of the contract period;
- Prohibit assigning or subcontracting the whole or any part of the contract without the prior written consent of the District;
- Operate as an independent contractor and will not be considered employee(s) of the Oswegoland Park District; and
- Paid on actual invoices as work is completed.

## **Submittal Deadline**

Fifteen (15) hard copies (one (1) unbound) and one (1) electronic copy of the proposal must be received by the Oswegoland Park District (313 E. Washington St., Oswego, IL 60543, (Attention: Rich Zielke) on or before 4:00 p.m. CST, April 18, 2018. Each proposal must be submitted with all required documentation.

## **Questions about RFP**

All questions regarding this RFP should be directed to Rich Zielke, Oswegoland Park District, at 630-554-4432 or [rzielke@oswegolandpd.org](mailto:rzielke@oswegolandpd.org).