

COMPREHENSIVE PLAN UPDATE PROJECT

Worcester Township, Montgomery County, Pennsylvania

OVERVIEW

Worcester Township ("Township") seeks proposals from qualified professional planning consultants ("Consultants") with proven experience in citizen involvement/participation, data analysis, land use planning, zoning, and subdivision and land development ordinances to assist in updating the community's 2008 Comprehensive Plan.

A Comprehensive Plan sets forth a community's vision by establishing goals, objectives and policies for: natural features and resources; land uses; housing and community development; historic and cultural resources; community facilities and services; parks, recreation and open space; fiscal impact and economic development; stormwater management; sewer, water and utility services; and transportation.

The goal of the Comprehensive Plan Update Project ("Project") is to create a strategic action-oriented Comprehensive Plan Update that (1) encompasses the Township's vision, (2) guides both development and preservation efforts, and (3) positions the Township to readily develop and enact any amendments to the Township Code – and in specific to the zoning and subdivision ordinances – that are needed to better align the Township Code to the Comprehensive Plan.

Zoning and subdivision ordinances are used to govern and guide land-use planning and development so to promote the health, safety, and welfare of Worcester Township. As part of this Project, the Consultant shall review these ordinances, and any other applicable provisions of the Township Code, and prepare a separate report that enumerates recommended amendments to the Township Code that are consistent with the Comprehensive Plan Update.

The Consultant will work with the Comprehensive Plan Update Task Force to be appointed by the Board of Supervisors. The Consultant will likewise present the proposed Comprehensive Plan Update and the recommended amendments to the Township Code to the Worcester Township Planning Commission and the Worcester Township Board of Supervisors.

It is expected the Project will be completed in twelve to eighteen months.

COMMUNITY OVERVIEW

Worcester Township is located in central Montgomery County. The population at 2010 Census was 9,750, and current population is estimated at 10,800. Most of the municipality's 16 square miles is developed or zoned for residential uses; the Township possesses a commercial and other modest non-residential development. While the Township has successfully preserved approximately more than 600 acres of open spaces and natural environments since 1970, there remains several larger tracts of ground that are eligible to be developed in the years to come. The Township wishes to continue its land preservation efforts, and is committed to working to ensure that all future growth is guided by sensible development standards that aim to retain and complement the community's higher quality of life.

COMPREHENSIVE PLAN, TOWNSHIP CODE & ANCILLARY DOCUMENTS

The current Comprehensive Plan was adopted in 2008. Current Township Code, which includes zoning and subdivision ordinances, has been updated on as needed basis. The 2008 Comprehensive Plan, previous versions of the Comprehensive Plan, and the Township Code are posted the Township website, at worcestertwp.com. It is strongly recommended Consultants review these documents prior to proposal submission.

In addition, the following ancillary documents will be made available for Consultant's use when preparing a proposal, upon request:

1. Worcester Township Act 537 Plan, addendums and select sewer mapping;
2. Worcester Township Open Space Plan;
3. Worcester Township Community Greenways Plan;
4. Worcester Township MS4 Permits and related information;
5. road, infrastructure and park capital improvement master plans;
6. annual budget for the current year and previous five years; and,
7. financial audits for the previous five years.

SCOPE OF WORK

The Consultant shall provide the full and complete range of planning services necessary to undertake and successfully complete the Project.

The Comprehensive Plan Update scope of work includes, at a minimum, the following:

1. Assess and update components of the 2008 Comprehensive Plan, including, at minimum:
 - a. overall goals and objectives pertaining to rural preservation, growth and development, environment, park and recreation, open space, sewage disposal and water supply, and transportation;
 - b. community demographic, socio-economic and other information, including regional information, natural resources, and a summary of relevant Township, County and State planning documents;
 - c. current and preferred areas of public and on-lot sewage service;
 - d. current and preferred areas of public and on-lot water service;
 - e. transportation and circulation planning, roadway conditions and classifications, roadway maintenance and improvement funding, and a Township-wide transportation plan;
 - f. existing and proposed parklands, trails, and active and passive recreational areas;
 - g. land preservation efforts to date, guidelines and goals for future land preservation projects, and an evaluation of various land preservation approaches and techniques;
 - h. historic preservation efforts to date, guidelines and goals for future historic preservation projects, and an evaluation of various historic preservation approaches and techniques; and,
 - i. existing land uses, future land uses, past and preferred development and redevelopment in the Township's three villages, growth trends.
2. Conduct a random survey that returns at least three hundred (300) completed responses, and that assesses current and future priorities, areas of concerns, and other criteria, and prepare a detailed report on the survey results.
3. Update all maps, diagrams and exhibits included in the 2008 Comprehensive Plan, and provide additional maps, diagrams and exhibits, as needed.

The Township Code recommendations scope of work includes, at a minimum, the following:

1. a concise summary of the recommended amendments to the Township Code that includes rationale for the amendment, Township Code citation, and corresponding reference(s) to the proposed Comprehensive Plan Update and other ancillary documents; and,
2. a list that prioritizes recommended amendments.

MEETING ATTENDANCE

Below is a list of public meetings the Consultant shall attend during project duration. The Consultant is expected to take a leading role at these meetings, and to facilitate productive discussion and the exchange of ideas among the appointed volunteers, Township staff and attending public.

<i>public meeting of the...</i>	<i>number of meetings...</i>
Comprehensive Plan Update Task Force	twelve (12)
Planning Commission	three (3)
Board of Supervisors	three (3)

The Project cost shall include all expenses for the number of meetings noted above. If Consultant is required to attend additional public meetings, Consultant shall be paid a flat per meeting fee, at a rate to be agreed upon by the Consultant and Township.

DELIVERABLES & NOTES

The Consultant shall provide the following:

1. For documents produced during the Project (i.e., draft reports, proposals, outlines), up to 11"x17", two (2) bound hard copies, one (1) unbound hard copy, and one (1) electronic copy in PDF format.
2. For documents produced during the Project, greater than 11"x17", twenty two (22) bound hard copies, and one (1) electronic copy in PDF format.
3. Fifteen (15) bound copies of the proposed Comprehensive Plan, for MPC review distributions, and one (1) electronic copy in PDF format.
4. Thirty (30) bound copies of the final Comprehensive Plan Update, as approved by the Board of Supervisors, and one (1) electronic copy in PDF format.
5. All final maps, diagrams and exhibits shall be prepared as an ArcGIS layer, so that the information may be integrated into the Township's GIS system, or prepared in another format approved by the Township. If a map is prepared as an ArcGIS map, this must be converted into an ArcGIS layer upon Project completion.

CONTENTS OF PROPOSAL

The length of the proposal shall not exceed fifteen (15) pages, not including exhibits to the proposal. The proposal shall include:

1. cover letter;
2. organization profile, including background and experience of the firm and project personnel;
3. project summaries, including reference contact information, for a minimum of five (5) projects that are similar in scope to the Project;
4. a proposed operation plan, including an explanation of technical approaches and a detailed outline of the proposed services for executing the requirements of the proposed scope of services;
5. a schedule for the Project, including the amount of time in months, and as a percentage of the total workload, for each component of the elements, map production, preparation of the draft and final version;
6. project management information, including (a) an organizational chart including key staff to be assigned (b) the location of office from which the management of the project will be performed, and (c) a summary/matrix of key personnel’s shared project experience;
7. support, if any, required to be provided by Township staff, Township consultants and/or others;
8. a detailed cost estimate for completing each component of the Project, based on the proposed operation plan and including (a) labor hours and billing labor rates for each key staff person and labor category for other staff, (b) labor overhead, and (c) a detailed breakdown of expenses including final formatting, graphics and production, reproduction, travel, printing, mailing, conference calls, other telecommunications, and other direct project expenses; and,
9. a “not to exceed” cost for the Project, with a breakdown as shown below:

Comprehensive Plan Update only	\$ _____
Township Code recommendations only	\$ _____
total	\$ _____
additional meeting fee	\$ _____ per meeting

Seven (7) hard copies of the proposal, and one (1) electronic copy of the proposal, must be received at the Worcester Township Building, 1721 Valley Forge Road, Post Office Box 767, Worcester, PA 19490 on or before _____.

All proposals shall remain valid and in full effect for a period of one hundred twenty (120) days after the deadline for submission of proposals. The Township reserves the right, in its sole discretion, to reject any or all proposals, or parts thereof, and to waive any informalities or irregularities in any proposal received.

If you have questions about this RFP, or require additional information, contact Township Manager Tommy Ryan at (610) 584-1410, or by e-mail at tryan@worcestertwp.com.

GENERAL REQUIREMENTS

1. Right to Modify, Rescind or Revoke the Request for Proposals (RFP). The Township reserves the right to modify, rescind or revoke this RFP, in whole or in part, at any time prior to the date on which the authorized representative of the Township executes a contract with the selected Consultant. The Township may also award a contract for a one of the two phases of this project, depending on available funding resources or other factors.
2. Right to Reject. This RFP does not commit the Township to proceed with the Project, select a Consultant, or to award a contract to any Consultant.
3. Schedule of Events. The Township will make a good faith effort to follow the timeline set forth in this RFP for evaluating, negotiating and issuing an award.
4. Ownership of Property. All proposals shall become the physical property of the Township upon receipt. All work product prepared by the Consultant selected for the Project shall be the property of the Township.
5. Cost of Participation. The Township specifically disclaims responsibility and/or liability for any and all costs, expenses, or claims relating to or arising out of Consultant participation in this RFP process, including, but not limited to, cost incurred as a result of preparing, copying, shipping, presenting, and/or clarifying the proposal and the information relevant to the proposal.
6. Compliance with Applicable Laws, Regulations and Ordinances. By submitting a proposal, Consultant agrees to and shall comply with all applicable local, county, state and federal laws, regulations and ordinances.
7. Insurance. The selected Consultant shall, before Project commences, procure and maintain at its own expense during the duration of the performance of this project the following types of insurance with insurance companies authorized to operate in the Commonwealth of Pennsylvania and acceptable to the Township Professional Liability an amount not less than \$500,000 Minimum Limit.
8. Proposal Effective Date. All proposals must remain in effect and shall not be withdrawn for a minimum of one hundred twenty (120) days from the date proposals are due. Proposals may be withdrawn in writing prior to the date proposals are due, providing this written notification is received by the Township by the date proposals are due.
9. Township Right to Select. The Township reserves the right to select a Consultant judged to be the best suited to successfully complete the Project, in the sole discretion of the Board of Supervisors. While Project cost is an important consideration in the selection of a Consultant, it is not the only consideration. The Township reserves the right to award a contract to separate Consultants, for each of the two parts of the Project – the Comprehensive Plan Update and the Township Code recommendations – and the Township reserves the right to award a contract for only the Comprehensive Plan Update. Should only one proposal be received, the Township reserves the right to initiate negotiations with this Consultant, or to reject the proposal at any time during the one hundred twenty (120) day period that proposals remain effective and to initiate a new proposal process, if the Township so desires.
10. Interviews. The Township may conduct interviews with any Consultant who submits an acceptable or potentially acceptable proposal. The Township reserves the right to request any Consultant provide additional information during the RFP process. As part of any interview process, the Consultant shall be prepared to make a brief presentation on the Consultant's expertise and approach to the Project. The Consultant shall also be prepared to answer questions related to their experience and their proposal.

GENERAL FUND

RECEIPTS	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Taxes	\$ 3,103,123.12	\$ 2,878,375.00	\$ 2,935,950.00	\$ 2,958,435.00
Licenses & Permits	\$ 228,623.79	\$ 228,725.00	\$ 226,850.00	\$ 225,725.00
Fines & Forfeits	\$ 4,319.89	\$ 2,900.00	\$ 2,950.00	\$ 2,600.00
Interest & Rents	\$ 187,487.36	\$ 174,569.21	\$ 195,230.00	\$ 187,063.00
Intergovernmental Revenue	\$ 143,981.79	\$ 140,653.79	\$ 140,853.79	\$ 140,653.79
Charges for Services	\$ 192,083.08	\$ 119,965.00	\$ 138,630.00	\$ 167,985.00
Miscellaneous Revenue	\$ 26,333.31	\$ 15,850.00	\$ 20,960.00	\$ 17,250.00
Other Financing	\$ 610.00	\$ 500.00	\$ 1,260.00	\$ 525.00
	\$ 3,886,562.34	\$ 3,561,538.00	\$ 3,662,683.79	\$ 3,700,236.79

EXPENDITURES	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Legislative	\$ 92,878.76	\$ 99,165.82	\$ 92,950.00	\$ 99,831.06
Management	\$ 198,335.61	\$ 204,873.95	\$ 199,875.00	\$ 204,462.44
Finance	\$ 97,593.48	\$ 97,059.89	\$ 69,500.00	\$ 101,432.36
Tax Collection	\$ 34,527.20	\$ 37,883.59	\$ 37,760.00	\$ 38,388.91
Legal	\$ 67,401.42	\$ 75,000.00	\$ 73,400.00	\$ 73,800.00
Clerical	\$ 185,540.08	\$ 224,274.11	\$ 212,700.00	\$ 289,461.57
Engineering	\$ 19,921.05	\$ 37,000.00	\$ 20,750.00	\$ 34,750.00
Township Building	\$ 26,706.85	\$ 32,604.00	\$ 27,450.00	\$ 33,984.00
Garage	\$ 23,016.46	\$ 27,264.00	\$ 25,350.00	\$ 28,764.00
Community Hall	\$ 9,542.29	\$ 10,212.00	\$ 9,575.00	\$ 11,856.00
Historical Building	\$ 5,963.60	\$ 6,115.00	\$ 4,950.00	\$ 6,193.00
Hollow Road Rental	\$ 1,356.20	\$ 4,282.00	\$ 1,750.00	\$ 4,282.00
Springhouse	\$ -	\$ 1,000.00	\$ -	\$ 1,000.00
Fire Protection	\$ 333,697.02	\$ 366,014.76	\$ 364,400.00	\$ 374,008.76
Code Enforcement	\$ 113,729.86	\$ 172,267.29	\$ 125,075.00	\$ 178,788.14
Zoning Hearing Board	\$ 28,481.95	\$ 39,133.84	\$ 28,430.00	\$ 43,253.84
PA One Call	\$ 1,814.50	\$ 2,700.00	\$ 1,000.00	\$ 2,700.00
Public Works	\$ 599,528.39	\$ 651,031.86	\$ 615,750.00	\$ 698,623.59
Snow Removal	\$ 48,141.34	\$ 42,887.50	\$ 34,200.00	\$ 31,675.00
Traffic Signals	\$ 22,365.89	\$ 22,580.00	\$ 9,900.00	\$ 21,240.00
Machinery & Tools	\$ 83,525.84	\$ 92,064.00	\$ 56,800.00	\$ 92,160.00
Road Maintenance	\$ 104,819.24	\$ 112,915.00	\$ 83,800.00	\$ 109,905.00
Stormwater Management	\$ 5,426.09	\$ 56,400.00	\$ 19,500.00	\$ 37,500.00
Recreation Administration	\$ 17,819.13	\$ 28,335.00	\$ 21,000.00	\$ 23,597.69
Recreation & Culture	\$ 27,425.42	\$ 27,846.00	\$ 25,596.00	\$ 27,794.00
Parks	\$ 26,213.65	\$ 50,788.00	\$ 31,900.00	\$ 48,634.00
Public Relations	\$ 23,389.09	\$ 21,600.00	\$ 19,500.00	\$ 21,300.00
Other	\$ 2,229,869.28	\$ 1,018,240.40	\$ 1,449,822.79	\$ 1,060,851.43
	\$ 4,429,029.69	\$ 3,561,538.00	\$ 3,662,683.79	\$ 3,700,236.79

2020 GENERAL FUND **\$ 0.00**

agenda item b)

STATE FUND

RECEIPTS	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Interest	\$ 3,783.89	\$ 1,800.00	\$ 4,800.00	\$ 1,800.00
Licenses	\$ 363,273.08	\$ 366,609.00	\$ 380,698.00	\$ 380,698.00
	\$ 367,056.97	\$ 368,409.00	\$ 385,498.00	\$ 382,498.00

EXPENDITURES	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Public Works	\$ 350,000.00	\$ 360,000.00	\$ 360,000.00	\$ 378,000.00

2020 STATE FUND				\$ 4,498.00
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SEWER FUND

RECEIPTS	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Wastewater	\$ 919,206.34	\$ 679,717.88	\$ 687,480.00	\$ 694,340.10
	\$ 919,206.34	\$ 679,717.88	\$ 687,480.00	\$ 694,340.10

EXPENDITURES	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Wastewater	\$ 572,724.36	\$ 670,009.66	\$ 637,049.16	\$ 693,847.96

2020 SEWER FUND				\$ 492.14
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CAPITAL FUND

RECEIPTS	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
Interest	\$ 186,545.59	\$ 180,000.00	\$ 281,000.00	\$ 240,000.00
Other Government Levels	\$ 45,000.00	\$ 1,352,340.00	\$ 104,000.00	\$ 1,312,540.00
Fees	\$ 471,896.38	\$ 16,204.00	\$ 28,300.00	\$ 33,095.85
Transfers In	\$ 2,115,270.48	\$ 905,987.80	\$ 1,339,322.79	\$ 942,452.13
	\$ 2,818,712.45	\$ 2,454,531.80	\$ 1,752,622.79	\$ 2,528,087.98

EXPENDITURES	2018 Actual	2019 Budget	2019 Projected	2020 Proposed
General Government	\$ 105,334.73	\$ 58,000.00	\$ 54,500.00	\$ 53,200.00
Public Works	\$ 505,086.66	\$ 2,493,334.00	\$ 1,361,500.00	\$ 2,446,850.00
Parks & Recreation	\$ 272,280.82	\$ 227,500.00	\$ 309,000.00	\$ 122,000.00
	\$ 882,702.21	\$ 2,778,834.00	\$ 1,725,000.00	\$ 2,622,050.00

2020 CAPITAL FUND \$ (93,962.02)