



Whitemarsh TOWNSHIP

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Whitemarsh Township Request for Proposals From Consultant Firms Interested in Preparation of a “Selective Comprehensive Plan Update”

(Release Date: February 21, 2017)

INTRODUCTION AND BACKGROUND

Whitemarsh Township, a municipality of the Second Class governed by a Home Rule Charter, is requesting written proposals to prepare an *Update to the Township’s 2003 Comprehensive Plan Land Use and Housing Elements* (the *Update*). The Township, located in southern Montgomery County, PA, is a first-ring Philadelphia suburb, with its southern boundary along the Schuylkill River. The Township is approximately 14.5 square miles, with a current population in excess of 17,500. It shares boundaries with Conshohocken Borough, Plymouth, Whitpain, Upper Dublin and Springfield Townships, and a short boundary with Philadelphia near the Schuylkill River.

A number of plans have been completed and adopted as amendments to the 2003 Comprehensive Plan. These various plans focus on open space, recreation, pedestrian and bicycle mobility, and on the riverfront portions of the Township. The most recent plan, the *Riverfront Plan*, was adopted in June, 2016. That plan was done jointly with Conshohocken Borough, and examined the portion of the riverfront and adjacent areas, generally between SEPTA’s Spring Mill regional rail station in the Township, and SEPTA’s Conshohocken regional rail station in the Borough. All of the Township’s plans are available on the Township website (<http://www.whitemarshtwp.org/249/Township-Plans>).

The Township Board of Supervisors established a ‘Comprehensive Plan Review Committee’ in late 2015 which reviewed the 2003 Plan document, and met a number of times with Township staff. After thoroughly reviewing and discussing the document, the consensus was that the Land Use and Housing Elements are out of date and are not completely consistent with land development trends over the last decade-plus. They are also not necessarily consistent with current Township policies toward land use, particularly residential land use.

SUBMISSION REQUIREMENTS

Five (5) paper copies of the technical proposal shall be submitted. Five (5) paper copies of the cost proposal shall also be submitted, packaged separately from the technical proposal. The words, “Technical Proposal, Comprehensive Plan Update” and “Cost Proposal, Comprehensive Plan Update” shall appear on the respective packages. A thumb drive with both the technical proposal and the cost proposal, shall also be submitted and shall be included in the technical proposal package. The technical

proposal and cost proposal shall both be submitted **by 4 PM (Eastern Daylight Savings Time) March 17, 2017** to:

Charles L. Guttenplan, AICP
Director of Planning & Zoning
Whitemarsh Township
616 Germantown Pike
Lafayette Hill, PA 19444

Proposals may be hand delivered, delivered by U. S. Postal Service, or by private carrier/courier. **Proposals that are faxed or sent electronically will not be accepted. Proposals submitted or received after the deadline or proposals that are non-responsive to the requirements of this RFP will not be considered.**

SCOPE OF WORK

The Consultant/Consultant Team is expected, at a minimum, to complete the Scope of Work which follows. The Scope is not necessarily all-inclusive and the Consultant/Consultant Team may add any additional tasks or services deemed necessary to complete the Plan Update and provide rationale for such additions.

- Review the 2003 Comprehensive Plan and other relevant plan documents prepared by Whitemarsh Township in the past.
- Review the Township's Zoning Ordinance and other relevant land use regulations.
- Review minutes and notes from the Comprehensive Plan Review Committee meetings.
- Supplement existing conditions information with the status of recent developments and land development proposals.
- Update demographic information to the extent necessary to provide a credible update to the Land Use and Housing Elements.
- Establish goals and objectives in collaboration with the Steering Committee with input from the Planning Commission.
- Review recent land development trends in the Township and consider these trends in formulating recommendations for the **Update**.
- Formulate a strategy for securing maximum public participation during the **Update** process.
- Recommend strategies for preservation of the Township's golf courses with contingency recommendations should any become nonviable in the future.
- Recommend options for accommodating any contemporary land uses not currently recognized in the Township's plans and land use regulations.
- Prepare a Housing Element that encompasses all the requirements of the PA Municipalities Planning Code; this Element shall address housing types, diversity, affordability, and density.
- Prepare a Land Use Element that encompasses all the requirements of the PA Municipalities Planning Code; this Element shall include a future land use plan that addresses land use type, location, and intensity, in addition to addressing community character (considering community image, gateways, etc.).

- Develop an 'Action Plan' which will prioritize the various recommendations throughout the **Update** document, indicating who would be the appropriate individual or board within the Township to have primary responsibility, whether consultants would be needed, and possible funding sources. The Action Plan should indicate which projects should be considered for upcoming operating budgets or to the Township's capital program.
- Recommend text changes in land use regulations or geographic realignment of any Zoning Districts and/or new Zoning Districts, to respond to the recommendations in the Land Use and Housing Elements.
- Coordinate and attend all meetings required of the Consultant/Consultant Team as detailed in this RFP and agreed to by the Township; required meetings shall include the required 'Public Meeting' of the Planning Commission and 'Public Hearing' of the Board of Supervisors, both as required by the PA Municipalities Planning Code.
- Prepare an **Update** document; a document with limited text and background data with an emphasis on maps* and graphic display, is encouraged. The document should be in a format that is easily displayed on the Township's website.

***Note:** Whitemarsh Township will provide all GIS layers available to the chosen Consultant/Consultant Team. The Consultant/Consultant Team is obligated to provide all original GIS layers created for all maps that are produced using the Township's original layers. The Consultant/Consultant Team is required to produce an existing 'zoning' layer as part of any mapping produced for the **Update**.

PROJECT TIMETABLE

The chosen Consultant/Consultant Team shall commence work on the **Update** no later than May 1, 2017. The **Update** and all associated meetings and hearings, are expected to be completed no later than June 30, 2018.

PROPOSAL CONTENT

The following is the minimum content required for response to this RFP. The precise format for the proposal is up to the responding Consultant/Consultant Team; brevity is encouraged.

Scope of Work: This shall demonstrate the approach the Consultant/Consultant Team intends to take in performance of the tasks outlined in the 'Scope of Work' section of this RFP. Any adjustments or additions proposed to the Scope of Work should be fully explained and justified.

Consultant/Consultant Team Qualifications: The qualifications of the Consultant/Consultant Team should be documented in narrative form, including the roles each firm will play if there is a team proposed; the lead firm and project manager must be identified. Résumés (two-page maximum length) shall be included for all professionals expected to work on this **Update**, for all firms. Examples of work, similar to that which is being requested in this RFP, completed within the last five years, shall be summarized for the consultant or lead firm. At least one example of work similar to that which a consultant team member will be contributing to this **Update**, should also be identified and summarized. A minimum of three client references for the consultant firm or lead firm, shall be provided, as well as at

least one reference for each other consultant team member. Name, address, phone, and e-mail for each reference shall be provided; the project for which the reference is being listed, shall also be clearly identified.

Project Timetable: A proposed timetable shall be provided, indicating the total time projected for completion of the **Update** and major tasks. Key milestones for the project shall be indicated, including when meetings and hearings are anticipated.

Cost Proposal: A cost proposal for a total contract not-to-exceed amount shall be submitted; costs shall be provided for each major task or phase proposed. A narrative summary of the cost proposal shall be provided as part of the overall cost proposal including any assumptions used in developing the projected cost. The cost proposal shall be a separate document from the technical proposal.

CONSULTANT/CONSULTANT TEAM OBLIGATIONS

Meeting attendance: A Steering Committee will be established to work with the Consultant/Consultant Team. The Committee will include all interested members of the Comprehensive Plan Review Committee, a representative of the Township Planning Commission, a representative of the Whitemarsh Township Board of Supervisors, and appropriate Township Staff. The Consultant/Consultant Team is expected to attend meetings of the Steering Committee, meetings with the Township Planning Commission, and one public hearing with the Whitemarsh Township Board of Supervisors when the Board is considering adoption of the **Update**. The Consultant/Consultant Team will be expected to lead the meetings or those portions of the meetings devoted to the **Update**, including preparation of agendas/applicable portion of agendas.

In addition, the Consultant/Consultant Team is expected to attend meetings designed to maximize community engagement. The Consultant/Consultant Team should provide its plan for community engagement which maximizes the extent of engagement by the broadest variety of individuals, organizations, businesses and institutions. Opportunities for participation through various traditional and innovative methods, should be outlined in the Proposal.

Deliverables: The Consultant/Consultant Team shall provide memo's summarizing work to date along with draft sections of the **Update** for each Steering Committee meeting; appropriate material for community engagement meetings shall also be provided. The Township will distribute the material electronically and make copies of these materials from a 'master' provided by the Consultant/Consultant Team, as needed; Whitemarsh Township staff will assume responsibility for distributing all meeting material to all meeting attendees. All draft sections of the **Update** shall be provided in an electronic version to be displayed on the Township's website. When large-scale color maps or graphics are to be used at any meeting, the Consultant/Consultant Team shall provide an appropriate number of copies of these. When a final draft of the **Update** is completed, the Consultant/Consultant Team shall provide a 'master' of this for the Township to copy, as well as an electronic version to be displayed on the Township's website.

The Consultant/Consultant Team shall provide an electronic version of the final **Update** document when approved by the Township, as well as fifteen (15) hard copies in color. The Township encourages the Consultant/Consultant Team to prepare a final **Update** document that contains only essential text and background data with an emphasis on graphic display. The document should be in a format that is easy

to distribute and display by electronic means. All maps shall be provided at a scale large enough for public presentation as well as at reduced scale for normal copying; maps shall be in color. In addition to paper copies, all maps shall also be provided electronically in both GIS and PDF format.

Invoicing: The Consultant/Consultant Team shall invoice the Township monthly. In the case of a consultant team, invoices shall include the cost of services from all members of the team as well as all out-of-pocket costs. Payment will be made to the lead Consultant in the case of a team; it shall be the obligation of the lead Consultant to disperse any payments due other team members.

PROPOSAL EVALUATION

A Township Committee will review and evaluate all proposals. Interviews will be held at the discretion of the Committee. The decision of the Committee will be final.

The following are the Evaluation Criteria to be used by the Committee for all proposals:

- Responsiveness to RFP
- Proposed Scope of Work/Innovative approaches to tasks and/or public engagement
- Applicability and quality of previous work
- Qualifications of staff
- Feedback from references
- Budget

QUESTIONS

All questions concerning this RFP shall be directed to Charles Guttenplan via e-mail at cguttenplan@whitemarshtwp.org no later than 4 PM on March 1, 2017. All responses will be posted on Bids/RFP page of the Township's website at <http://www.whitemarshtwp.org/Bids.aspx?CatID=21> by 4PM on March 8, 2017. Responses will not be provided to questions received after the deadline.

PROJECT TIMETABLE SUMMARY

RFP Issued and placed on Township website:	February 21, 2017
Deadline for RFP Questions:	March 1, 2017
Response Deadline for RFP Questions:	March 8, 2017
Deadline for Submission of Proposals:	March 17, 2017 (by 4 PM EDST)
Interviews (if deemed necessary):	Week of April 3, 2017
Approval of recommended consultant by Board of Supervisors:	April 13, 2017
Work on Update to begin: (Contract executed between Consultant/Consultant Team and Whitemarsh Township prior to start date.)	May 1, 2017
Work on Update to be completed:	June 30, 2018