

Waukegan Park District

Request for Proposals Strategic Plan and Community Needs Assessment



Issue Date: March 20, 2024

Submission Deadline: April 22, 2024, at 10 am

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1. General Information

Introduction

The Waukegan Park District (WPD) is seeking proposals from qualified and experienced firms (Firm(s)) to develop a Strategic Plan and Community Needs Assessment (Plan) that will guide development and management of the WPD's parks, recreation programming, open space, trails, and facilities.

The Plan will serve as a roadmap to achieve community goals through clear, data-driven recommendations. The Plan will provide policy makers with a feasible approach to leverage development of the WPD's parks and recreation resources with other community partners, agencies, and initiatives.

The purpose of WPD's Strategic Plan and Community Needs Assessment Plan is to guide clear decisions on present and future maintenance of an outstanding parks and recreation system. To achieve this, the Plan will:

- Provide data-driven and supported insights into the ever-changing community priorities and perspectives.
- Evaluate available resources and identify the most strategic investment paths.
- Combine technical and economic feasibility with robust, broadly supported public priorities to identify major themes.
- Develop a strategic action plan for presentation to the Board of Commissioners for approval.
- Support national CAPRA accreditation requirements for an exemplary Parks and Recreation program as well as state requirements for an IAPD/IPRA Distinguished Accredited Agency.

The Plan will contain two components:

- a Strategic Plan for the WPD's facilities, programming and services laying out how the mission, goals and objectives will be achieved over the next five years.
- a Community Needs Assessment to analyze the needs of the community.

The Strategic component will state how WPD will achieve its mission, goals, and objectives over the next five years. This component will have measurable goals and objectives that can be reviewed annually to demonstrate progress and results.

The Community Needs Assessment will analyze the current needs of the community through surveys, community input meetings and various other outreach techniques and will produce data-driven analyses that set measurable and realistic goals, which are supported by the community as well as existing and potential public and private partners.

Both components of this Plan will demonstrate substantial and meaningful engagement of affected residents, groups, organizations, and agencies in the community. Public outreach will be planned and implemented to understand the perspectives and goals of WPD's diverse demographics, and to

establish support for the Strategic Plan mission, vision, values, and goals.

About the Waukegan Park District

Established on December 26, 1916, the Waukegan Park District (WPD) has 52 properties and more than 740 acres of land, including the 18-hole Bonnie Brook and 9-hole Greenshire Golf Courses. Properties are managed to the highest environmental and conservation standards. Facilities operated by the WPD include the Field House Sports, Fitness and Aquatics Center, Jack Benny Center for the Arts, Administrative Building, Waukegan's Greg Petry SportsPark, Waukegan Skate Park, BMX Track, SplashZone, Percussion Playground, recreational centers, disc golf course, dog exercise area and agility course, outdoor sports fields, picnic areas, playgrounds, splash pads, and sports courts including basketball, tennis and pickleball. A full range of programs and services are offered year-round for all ages, from infants to seniors, as well as special need populations. Healthy lifestyles, wellness initiatives, and a connection with the outdoors and nature are integrated throughout programs, services, and special events. Cultural events are provided by the Waukegan Symphony Orchestra and Concert Chorus and the Waukegan History Museum.

Our Mission

The Waukegan Park District is committed to providing parks, facilities, and leisure opportunities to our culturally diverse population through leadership with community involvement, dedicated staff and sound management.

Our Vision

An innovative park district that creatively adapts to our evolving community and provides exceptional parks, recreation and cultural arts that benefit all.

Our Values

- **Accountability:** We will work to achieve the most effective and efficient use of our financial resources while striving for the best return on the use of our assets.
- **Excellence:** We will strive for the best in everything we do.
- **Integrity:** We will practice steadfast adherence to a high moral and ethical code, and we will reliably deliver on what we say we are going to do.
- **Service Oriented:** We will focus our efforts on our customers and operate the District based on the needs of the community.
- **Working Together:** We will work WITH one another.
- **Sustainability:** The Board and staff will use a collaborative and cooperative team-based approach that results in the best possible decisions for the long term greater good of the entire community.

Project Background

The Waukegan Park District is developing a strategic plan that will serve as the framework for the next five (5) years and guide decision-making, resource allocation, and performance evaluation across operations. With a commitment to enhancing community engagement, fostering recreational opportunities, and preserving natural resources and green space, the Waukegan Park District aims to create a strategic framework that aligns with the evolving needs of the diverse population served.

The strategic plan will be a proactive approach to address the challenges and opportunities facing the Waukegan Park District and the needs highlighted through the community needs assessment. Through the strategic planning process, the Waukegan Park District seeks to identify emerging trends, assess current strengths and weaknesses, and establish clear goals and objectives for the future. Areas of focus are listed below:

- Analyze needs assessment results to identify community priorities and evolving needs.
- Establish actionable goals and objectives that align with the Waukegan Park District's mission, vision, and values.
- Engage stakeholders by soliciting feedback and creating opportunities for public participation.
- Establish clear benchmarks and performance indicators to measure progress.

RFP Coordinator

Upon release of this RFP, all communication concerning this proposal request should be directed to the RFP Coordinator listed below. Unauthorized contact regarding this RFP may result in disqualification. Any oral communication will be considered unofficial and non-binding to the WPD. The respondent should rely only on written statements issued by the RFP Coordinator.

Shelby McDonald
Director of Marketing & Community Relations
1324 Golf Road, Waukegan, IL 60087
Telephone: 847-360-4626
Email: smcdonald@waukeganparks.org

Questions Regarding the RFP

Requests for clarification or additional information must be made in writing to the RFP Coordinator before the date specified in the RFP Schedule. Written responses to all requests will be furnished to all potential proposers as determined by WPD's receipt of a completed RFP Acknowledgement Form (Attachment A). The RFP Coordinator will be unable to respond to requests for additional information or clarification received after 10:00 am on April 22, 2024.

RFP Amendments

In the event of a material modification, all potential proposers will be notified of an amendment to the RFP as determined by WPD's receipt of a completed RFP Acknowledgment Form (Attachment A). If deemed necessary by WPD, proposers will be given an opportunity to modify their proposal in the specific areas that are affected by the modification.

2. Scope of Services

The building blocks for development of this Strategic and Community Needs Assessment Plan will include the following:

Public Participation

The public participation element is integral to identification of major themes and goals that the community will broadly and robustly support. Aspects of the proposed public participation process must include:

- **Community Outreach:** An extensive series of varied public input opportunities both qualitative and quantitative will pay particular attention to capturing insights, goals, and perspectives from diverse demographics.
- **Stakeholder Input:** Input will also be sought from WPD staff, partner agencies and affected groups including the City of Waukegan, Waukegan School District 60, WPD affiliate groups, and key private sector stakeholders.
- **Community Survey:** This will be a statistically valid survey of residents and users of the Waukegan Park District.

Strategic Plan Development

This will recommend prioritized actions and strategies to guide the department over the next five years based on both community input and data analyses.

- Recommended actions and strategies will be grounded in economic feasibility and in demonstrated data showing community support.
- Specific, measurable performance objectives or outcomes will be identified for each goal and/or theme.

Community Needs Assessment

Review the existing data including the current Parks, Facilities and Open Space Master Plan and the Strategic Plan outcomes.

- Quantitative survey design.
- Collection of quantitative research data.
- Connecting with our Spanish speaking majority and youth in the community is especially important.
- Qualitative data collected through site visits and community forums.
- Data analysis and a written report that reflects both quantitative and qualitative findings.

Final Report & Presentation

The final report will concisely present the Strategic Plan in clear and accessible language. The Firm will make an on-site presentation to report and summarize findings to the Waukegan Park District Board of Commissioners. 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 digital visual presentation version in an Adobe Portable Document Format (PDF) of the report will be included that can be added to the WPD's website and downloaded to a flash drive, or other software to allow for viewing by the general population.

3. Staff Services & Progress Reporting

Services Provide by Staff

The Waukegan Park District will assist the Firm in managing the operational aspects of the project and coordinating work with the relevant parties. WPD will provide overall support for project tasks and assign Department Directors to serve as the liaison for specific sections of the project. The RFP Coordinator can provide all existing documentation (as requested by the Firm) and compile contact information for staff and local organizations. WPD staff will also schedule, coordinate staff availability based on their work schedules, and make all necessary arrangements for meetings and interviews conducted by the Firm during this project.

The Firm, RFP Coordinator and the Executive Director will hold progress meetings as often as necessary, but in no case less than once per month until a final plan is approved by the Waukegan Park District Board of Commissioners. The RFP Coordinator shall schedule the progress meetings, as needed, at key times during the Plan's development. The Firm shall provide the RFP Coordinator with at least one (1) copy of all completed or partially completed reports, studies, forecasts, maps, or plan as deemed necessary by the RFP Coordinator.

4. Administrative Information

Who May Apply

The Waukegan Park District is contacting firms who have indicated an interest and are known to do business relevant to this RFP and whom the Waukegan Park District deems qualified to meet their needs and provide the desired level of quality.

Qualifications

At a minimum, the Firm must meet the following qualifications:

- Experience with park and recreation agencies
- Specific experience with obtaining quantitative and qualitative data from a Spanish speaking population
- Willingness to bring ideas for improvement to park district staff
- Familiarity with park and recreation industry standards and trends
- Provide the number of years in business and the history of the Firm
- Submit examples of three (3) projects the Firm completed a Strategic Plan for in the park and recreation industry. The projects should be comparable in size and scope and have been completed in the last five (5) years.

Submitting Proposal

All respondents to the RFP must include the items provided below. All the items should be addressed completely and should follow, as closely as possible, the order and format in which it is shown below. These categories and criteria will be major considerations in the evaluation and determination of the most qualified, innovative, and capable Firm(s).

Letter of transmittal

Statement indicating an understanding of the work to be performed and interest in performing the scope of work.

- Discuss Firm's availability over the next 6-12 months; and
- Identify one (1) key contact person for communicating with WPD on the proposal and all project-related matters.

Project Management

- Introduction to the team (all Firm staff and sub-consultants assigned to complete work on the project), including resumes for all key personnel, which provide educational background/training, experience, and descriptions of role on past projects.
- Functional role of each team member as proposed for this project. (including all sub-consultants).
- Availability of assigned professionals who will undertake the scope of work.
- Process to complete all phases of project.
- Describe strategic overview and approach to the project.
- Explain how the components above reflect your qualifications for this project.

- Discuss what parameters you will use to develop a project that will be creative, logical, and engaging.
- Include detailed descriptions of the procedures and methods you propose using to complete all tasks within the scope of work.
- Discuss task correlation with a timeline for each phase of the project.
- Include the proposed process and methods to assure quality, cost, and schedule control.

References

List at least three (3) references we may contact.

- Indicate project names and the personnel assigned to the project roles and involvement in each project.

Overall Cost

Based on total fee to provide the services in the RFP. Proposals will be compared using base bid costs, relevant work, and references.

- Include a total “not to exceed” figure for the scope of work.

Schedule

Provide a detailed, proposed project work schedule using a start date of June 3, 2024 (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, presentations of the final report, etc.).
- Include timeframes for each major component of the scope of work and target dates for completing each phase of the project with a final completion date of January 6, 2025.

5. General Terms and Conditions

Communications

It is important that all potential respondents are given clear and consistent information. Questions about the interpretation of specifications or the RFP process must be directed in writing to Shelby McDonald, Director of Marketing & Community Relations, at: smcdonald@waukeganparks.org. Questions will not be accepted unless they are submitted in the aforementioned manner and will not be accepted if submitted after 10:00 am on April 22, 2024.

Incurred Costs

The Waukegan Park District is not responsible for any costs incurred in preparation of your response to this RFP. The preparation of your proposal shall be made without obligation by the Waukegan Park District to accept any of the items included in the proposal or to discuss the reason why your company is accepted or rejected.

Confidentiality

Proposals are subject to the Illinois Freedom of Information Act and the Local Records Act. Contracts are subject to review by the Waukegan Park District.

Subcontractors

Contractors may utilize the services of subcontractors to complement their expertise for specialty services. Subcontractors should be noted in the proposal. The District reserves the right to deny use of a subcontractor at any time for any reason. The contractor shall be responsible for the replacement of a subcontractor should the District request it.

Reserved Rights

The Waukegan Park District reserves the right to negotiate specifications, terms and conditions which may be necessary or appropriate to the accomplishment of the purpose of this RFP. The Waukegan Park District may seek clarification from a respondent at any time, after the submission date, and failure to respond promptly is cause for rejection. The Waukegan Park District reserves the right to reject any or all proposals for any reason.

Non-Discrimination

Contractors shall comply with the Illinois Human Rights Act and any rules and regulations promulgated in accordance therewith including, but not limited to, the Equal Employment Opportunity clause. Furthermore, the Contractor awarded the contract shall comply with the Public Works Employment Discrimination Act, the Illinois Drug Free Workplace Act and all other applicable state, federal, and local laws and regulations. The Contractor shall ensure subcontractor compliance with all laws.

Award of Contract

Award of contract will be made to the responsible contractor whose proposal is determined to be the best for the Waukegan Park District. Award of contract will be based on the evaluation criteria set forth herein. 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.

Understanding & 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 Waukegan Park 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

The proposal will disclose any professional or personal financial interest which could be a conflict of interest in contracting with the WPD. The firm 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.

6. Selection of Firm

Evaluation and Selection Process

Upon receipt and review of responses, the Waukegan Park District will determine the proposal that represents the best value with respect to the evaluation criteria stated herein. Firms will be contacted during the evaluation period if further information is needed. After a thorough review 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 virtual presentation on their qualifications and proposals. Based on these presentations, WPD will recommend to the Waukegan Park District Board the firm that is the best fit for the community and this project. This RFP does not commit the Waukegan Park District to award a contract, pay any costs incurred in the preparation of a proposal based on this request, or procure or contract for services. All proposals submitted in response to this RFP become the property of the Waukegan Park District. The Waukegan Park District reserves the right to accept or reject any or all proposals or portions of proposals received as a result of this request or cancel in part or in its entirety the RFP, if it is in the best interest of the Waukegan Park District to do so. No reasons shall be given for any decision by WPD to accept or reject any or all terms of any submitted proposals. The Waukegan Park District may require the selected company to participate in negotiations concerning contract price or the nature and extent of services to be provided.

7. Timeline of Selection Process & Project

The timeline for selecting a firm and anticipated project schedule.

Item of Action	Date
Request for Proposal Issued	March 20, 2024
Deadline for Proposal Submission	April 22, 2024, 10am (CST)
Firm Virtual Presentation with WPD Staff	April 29 – May 3, 2024
Final Selection by the Board of Commissioners	May 14, 2024
Final Plan Presentation and Approval by the Board of Commissioners	January 14, 2025

8. Terms and Conditions

The selected proposing firm must follow the following general requirements to be hired by the WPD.

Reservation of Rights

The WPD reserves the right to amend the RFP schedule or issue amendments to the RFP at any time, reserves the right to cancel or reissue the RFP, to reject any or all proposals, to waive any irregularities or informalities in the selection process, and to accept or reject any item or combination of items. The WPD reserves the right to request clarification of information from any proposer or to request supplemental material deemed necessary to assist in the evaluation of the proposal. The WPD reserves the right to reject and/or accept any agreement deemed by WPD to be in its best interest. This RFP does not obligate the WPD to accept or contract for any expressed or implied services. The WPD reserves the right to award the services, as described in the section titles "Scope of Services," in total or in part, to any combination of proposers.

Contract

In the event that the proposer to whom any services are awarded does not execute a contract within thirty (30) calendar days after the Waukegan Park District Board approval, the WPD may give notice to such proposer of intent to award the contract to the next most qualified proposer or to call for new proposals and may proceed to act accordingly. The executed contract may be terminated by the Waukegan Park District for any reason including, but not limited to, in the event the successful bidder:

- Fails to meet delivery schedules.
- Fails to perform in accordance with this contract; and/or
- Becomes insolvent and/or files for protection under the bankruptcy laws.
- The firm shall be entitled to just and equitable compensation for any satisfactory work completed by the termination date. Under no circumstances will any damages be paid as a result of the termination of this contract. If WPD exercises the right to terminate the contract early, the firm may be prohibited from submitting future proposals to the Waukegan Park District for a specified period.
- This document and the response shall serve as or be referenced in the final agreement between the WPD and the Firm. Should a conflict arise between the RFP submission and the formal agreement, the RFP submission shall take precedence.

Costs of Response

WPD will not reimburse any proposer for any of the costs involved in the preparation and submission of responses to this RFP or in the preparation for and attendance at subsequent interviews.

Proposer Responsibilities

Proposers shall thoroughly examine and be familiar with these specifications. The failure or omission of any proposer to receive or examine this document shall in no way relieve any proposer of obligations with respect to this proposal or the subsequent contract.

Insurance

Proposers shall submit proof of Professional Liability Insurance coverage in a minimum amount of \$1,000,000 and shall name the Owner as an additional insured on its commercial liability insurance policies, and further provide proof of Worker's Compensation Insurance sufficient to meet statutory requirements. The awarded firm will be required to annually submit proof of insurance coverage of at least \$1,000,000.

9.0 RFP Acknowledgment Form

Attachment A – RFP Acknowledgment Form

I hereby acknowledge receipt of the WPD Request for Proposal for the Strategic Plan and Community Needs Assessment and my firm's intent to submit a proposal in accordance with the RFP. Please send all communication regarding the RFP to the following individual:

Name: _____

Address: _____

Phone: _____

Fax: _____

E-Mail: _____

Signature

Date

Please Remit Acknowledgment Forms to:
Waukegan Park District
Attn: Shelby McDonald
Director of Marketing and Community Relations
1324 Golf Road
Waukegan, IL 60087