



# Peninsula Metropolitan Park District

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## Request for Proposal Strategic Planning Professional Services RFP No. 2022.01

### **Proposal Information**

**RFP No. 2022.01**

**Proposal Name:** PenMet Parks Strategic Plan

**Date Issued:** January 11, 2022

**Contact Person:** Ally Bujacich, Executive Director

**E-Mail Address:** [abujacich@penmetparks.org](mailto:abujacich@penmetparks.org)

**Telephone Number:** 253-858-3400

**Deadline for Clarifications:** Noon on January 24, 2022

**Proposals Accepted Until:** Noon on February 1, 2022

### **Submit Proposals To:**

Ally Bujacich, Executive Director  
[abujacich@penmetparks.org](mailto:abujacich@penmetparks.org)

### **Agency Description:**

Peninsula Metropolitan Park District (PenMet Parks) is a public agency that serves a population of over 40,000 residents in the greater Gig Harbor community in unincorporated Pierce County. PenMet Parks' mission is to *enhance the quality of life by providing parks and recreation opportunities for our community*. Since its inception in 2004, the District has adapted to meet the needs of the community and has seen significant program growth in recent years.

### **Project Description:**

PenMet Parks is a mission-driven metropolitan park district that is intentionally positioning itself to optimally meet the current and future needs of the community. The elected Board of Park Commissioners provides leadership and policy direction, and has adopted strategic goals and objectives for 2022 as recommended by the Executive Director.

The District is currently in a period of transition. Many of the adopted goals and objectives are foundational in nature in order to establish sustainable and functional systems that will elevate the parks and recreation services PenMet Parks provides for the community. The District is developing a 65,000 square foot indoor Community Recreation Center, which will result in additional organizational growth and transformation. We anticipate community demand for high-quality park and recreation services will continue. Within the last year senior staff leadership roles in all divisions of the organization have been permanently filled.

PenMet Parks desires to create a multi-year strategic plan to serve as a guide as the District moves forward into its next era. PenMet Parks last created a multi-year strategic plan in 2004, and it annually develops strategic goals and objectives. In addition, the District updates its Parks, Recreation, and Open Space (PROS) Plan periodically, with the last update in 2018 and the next update planned for 2022. Each of these processes provide an opportunity to identify functional shorter-term goals and objectives to advance the mission, vision, and strategic initiatives that are developed as part of the strategic plan.

The strategic planning process should reaffirm the mission of PenMet Parks, develop a compelling vision statement with community stakeholder input, define the District's core values, and identify overarching strategic initiatives that must be undertaken in order to achieve the vision. The strategic plan will be used as a tool to steer the District, including decision making, policy development, developing annual strategic goals and objectives, developing planning documents including the PROS plan, and creating and implementing divisional work plans. The plan is expected to be a living document that informs decision-making at all levels of the organization. It is imperative that the plan is developed and communicated to foster a strategic culture of ownership and accountability in all facets of the organization.

The District plans to embark on a significant planning and community engagement effort later in 2022 to define and prioritize community need related to parks and recreation services as part of its PROS plan update. The strategic plan will establish PenMet Parks' mission, vision, core values, and strategic initiatives to be used as the foundation for that effort. The PROS plan will continue the work of the strategic plan by translating the organizational strategic initiatives into functional goals and objectives.

### **Scope of Work:**

The selected firm will complete tasks including, but not limited to:

1. Recommend a strategic planning approach and process to achieve desired outcomes.
2. Implement the planning process. Lead PenMet Parks Commissioners, the Executive Director, and key staff members in the strategic planning process. Engage community stakeholders to develop a vision statement. Define foundational principles that will guide the approach to strategic planning.
3. Facilitate planning sessions, build consensus, and assimilate information into a final plan document.
4. Gather information, conduct research, and lead processes recommended as part of the planning process (for example, conduct a SWOT analysis for the District if recommended by the consultant).
5. Assimilate information into a concise, actionable ten-year organizational strategic plan that is professionally designed and suitable for both internal use and external communication. At a minimum, the plan should contain the following elements:
  - a. Reaffirm the mission.

- b. Develop a compelling vision statement that has community buy-in.
  - c. Define the District's core values.
  - d. Identify strategic initiatives.
  - e. Other key elements recommended by the consultant and accepted by the District.
6. Create an implementation plan. Recommend processes and engagement strategies to create a culture of ownership and accountability within the organization. Develop methods to monitor, measure, and report performance.
  7. Create a communication plan for internal and external stakeholders.
  8. Provide recommendations for periodic plan updates. Develop a policy that includes procedures to ensure the plan is appropriately utilized and updated as needed throughout its lifespan to accomplish the desired outcomes.
  9. Present the plan to the Board of Park Commissioners.

**Deliverables:**

1. Professionally designed, concise multi-year organizational strategic plan that is suitable for both internal use and external communication.
2. Implementation plan, including performance tracking, measurement, and reporting.
3. Communication plan for internal and external stakeholders.
4. Framework for periodic plan updates, including a policy that describes the procedures to utilize and update the plan.

**Project Schedule:**

The District desires to conduct an efficient strategic planning process and envisions the plan be complete by summer 2022. The consultant should propose a reasonable schedule to complete the scope of work.

**RFP timeline:**

|   |                                      |
|---|--------------------------------------|
| RFP issued                                | January 10, 2022                     |
| <b>Deadline for questions</b>             | <b>Noon on January 24, 2022</b>      |
| Responses to questions issued             | Noon on January 26, 2022             |
| <b>Proposals due</b>                      | <b>Noon on February 1, 2022</b>      |
| Interviews (if needed)                    | Anticipated week of February 7, 2022 |
| Selected firm notified of intent to award | Anticipated week of February 7, 2022 |
| Contract executed                         | Anticipated February 16, 2022        |

*PenMet Parks reserves the right to adjust the schedule.*

**Minimum Qualifications:**

Minimum qualifications are required for a firm to be eligible to submit a response to this RFP solicitation. Responses should clearly show compliance with these minimum qualifications. Those that are not responsive to these minimum qualifications may be rejected without further consideration.

The consultant should have demonstrated strategic planning facilitation experience for a public agency.

**Evaluation process and criteria:**

The RFP will be published and notice of its release sent to a select number of firms with relevant experience. The RFP and any addenda will also be available on the PenMet website at [penmetparks.org](http://penmetparks.org).

Following an evaluation of the proposals received, the respondents considered to have submitted the best proposal(s) may be requested to participate in an interview and final selection process.

PenMet will select the firm based on its professed ability to meet the overall expectations of PenMet Parks. PenMet reserves the right to reject all proposals.

The following criteria will be used in the selection process:

- The consultant's approach to the work.
- Experience and qualifications of the consultant and key personnel proposed to complete the work.
- Ability of the consultant to communicate and build consensus with stakeholders.
- Satisfaction of clients with competency of the consultant and the completed work.
- Ability to complete the work within the desired time schedule.
- Fee proposal.
- Alignment of proposed deliverables and examples of completed projects with District's desired outcomes.

**RFP submittal instructions:**

It is the obligation and responsibility of the consulting firm to learn of addendums, responses, or notices issued by PenMet Parks relative to this RFP.

All submittal response materials must be received no later than time and date listed in the RFP timeline. Electronic submissions are required.

**RFP submittal format:**

Limit proposals to fifteen (15) single-sided sheets, submitted electronically, and an appendix as described below (cover and back and appendix are not included in the page count). Include the following elements in the response to this RFP:

1. Introduction:
  - a. Cover letter with consultant's name, address, email, phone number and website.
  - b. Contact person's name, address, email and phone number.
  - c. Statement of consultant's philosophy.
  - d. A concise statement that demonstrates the consultant's understanding of the project and scope of services sought by PenMet Parks.
  - e. Description of the consultant's approach to the project.
2. History and experience of the consultant:
  - a. Location.
  - b. Number of years in business.
  - c. Type of organization.
  - d. List of principals and stakeholders, if applicable.
  - e. Description of size and composition of the organization.
  - f. Geographical areas of operation.
  - g. Relevant completed strategic plans. Include at least three references.
3. Key project personnel:
  - a. Resumes for key personnel who will be assigned to this project, including relevant experience, credentials, and references.
4. Proposed deliverables:
  - a. List proposed deliverables. Include proposed deliverables not listed in the scope of work above if appropriate.
5. Proposed schedule:
  - a. Provide a proposed schedule, including start and completion dates for each major activity.
6. Fee proposal:
  - a. Provide a detailed breakdown of the firm's proposed fee. Identify proposed personnel and respective hourly rates for each task, and provide the estimated hours for each task. Fees should be structured on an hourly basis, with a proposed not-to-exceed amount identified.
  - b. If applicable, provide a separate fee breakout for recommended additional deliverables not listed in the scope of work (see 4a above).
7. Appendix (not included in page count):
  - a. Provide two examples of strategic plans the consultant has created.

**Questions/Inquiries:**

Direct all questions concerning this RFP to the contact identified below. Responders may submit written questions, by e-mail only, at any time prior to the question deadline identified in the RFP timeline. Unauthorized contact regarding this RFP with other

District employees may result in disqualification of a submittal. Only written, e-mailed questions or inquiries will be accepted. Questions and their responses will be shared on the PenMet website ([penmetparks.org](http://penmetparks.org)).

Contact: Ally Bujacich, Executive Director  
[abujacich@penmetparks.org](mailto:abujacich@penmetparks.org)

## **DISCLOSURES:**

- **REJECTION OF PROPOSALS:** PenMet Parks reserves the right to reject any and all proposals and to waive irregularities and informalities in the submittal and evaluation process. This Request for Proposal does not obligate PenMet Parks to pay any costs incurred by respondents in the preparation and submission of a proposal. Furthermore, the Request for Proposals does not obligate PenMet Parks to accept or contract for any expressed or implied services.
- **CONTRACT AWARD:** PenMet Parks reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be initially submitted in the most favorable light. PenMet Parks shall not be bound or in any way obligated until both parties have executed a written vendor contract. The respondent selected will be expected to enter into a contract with PenMet Parks.
- **PAYMENT:** All invoices related to the contract shall be paid by a PenMet Parks warrant usually within 30 days of PenMet Parks' receipt of a proper invoice and PenMet Parks approval of the respondent's completed tasks/deliverables to the date of the invoice or monthly report, as appropriate.
- **EQUAL OPPORTUNITY EMPLOYMENT:** The successful respondent must comply with PenMet Parks equal opportunity requirements. PenMet Parks is committed to a program of equal employment opportunity regardless of race, color, creed, sex, age, nationality or disability.
- **BACKGROUND CHECK:** The successful respondent may be required to submit to a criminal background check. If a background check is required, the contract award shall be contingent upon PenMet Parks receipt of an acceptable background check report for any persons providing services or work under the agreement.
- **INSURANCE REQUIREMENTS:** The successful respondent shall maintain insurance that is sufficient to protect the respondent and PenMet Parks against all applicable risks.
- **NON-ENDORSEMENT:** As a result of the selection of a respondent to supply products and/or services to PenMet Parks, the successful respondent agrees to make no reference to PenMet Parks in any literature, promotional material, brochures, sales presentation or the like without the express prior written consent of PenMet Parks.
- **NON-COLLUSION:** Submittal and signature of this Proposal swears that the Proposal is genuine and not a sham or collusive, and not made in the interest of any person not named, and that the Firm has not induced or solicited others to submit a sham offer, or to refrain from proposing.
- **COMPLIANCE WITH LAWS AND REGULATIONS:** In addition to the nondiscrimination requirements previously listed, the successful respondent shall comply with all applicable federal, state and local laws, statutes and ordinances relative to the execution of the work. This requirement includes, but is not limited to, protection of public and employee safety and health; environmental protection; waste reduction and recycling; the protection of natural resources; permits; fees; taxes; and similar subjects.
- **PUBLIC RECORDS:** Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this RFP (the "documents") become a public record upon submission to PenMet Parks, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. If PenMet Parks receives a request for inspection or copying of any such documents it will endeavor to notify the person submitting the documents to PenMet Parks (by U.S. mail or by e-mail if the person has provided an e-mail address, or by fax if the person has provided a fax number) and upon the written request of such person, received by PenMet Parks within five (5) calendar days of the mailing of such notice, will postpone disclosure of the documents for a reasonable period of time as permitted by law to enable such person to seek a court order prohibiting or conditioning the release of the documents. PenMet Parks assumes no contractual obligation to enforce any exemption nor any contractual obligation to provide such notice.