

**BRISTOL TOWNSHIP  
BUCKS COUNTY, PENNSYLVANIA**



**STRATEGIC MANAGEMENT PLANNING PROGRAM  
PROPOSAL AND FIVE-YEAR FINANCIAL PLAN**

**REQUEST FOR PROPOSAL**

**November 17, 2022**

**RESPOND NO LATER THAN: December 19, 2022**

**INQUIRIES/CONTACT INFORMATION:**

Randee J. Elton, Township Manager

267-812-9214

Email: [relton@bristoltownship.org](mailto:relton@bristoltownship.org)

## INTRODUCTION

### Township Information/Background

Bristol Township, hereinafter “the **Township**” was established in 1692 and is governed by an elected seven-member Council pursuant to the Home Rule and Optional Plans Government Law, The Township is located in Bucks County, Pennsylvania and is second largest municipality in the County. The Township encompasses 17.7 square miles. The **Township** is comprised of 12 Departments entailing: Township Manager’s Office, Finance, Tax, Sewer, Police, Public Works, Building and Planning, Parks and Recreation, Fire Marshal and Emergency Management, Community Development, Trash and Recycling and Information Technology. The Township employs approximately 170 workers comprised of 120 full-time, 25 part-time and 25 seasonal employees.

The most recent Census Data reports a total population of 54,291. Population consists of 49% male, 51% female, with 23% of the population over 65 years of age. 89.9% have high school degrees and 21.8% have a bachelor’s degree or higher. Median family income is \$69,443 (about three-quarters of the amount in Bucks County \$93,181) and per capita income is \$31,293 about two-thirds of the amount in Bucks County \$47,266). Persons in poverty is 10.2%. The Owner-Occupied Housing Unit Rate is 96%.

Our goal with the STMP program is to have a complete review of all **Township** Departments, to include: (a) Management Operations; (b) Policy and Procedures; (c) Programs and Services, and (d) Finances.

Through the development and implementation of the STMP program, the **Township** will be better positioned to continue with plans for future growth and development. The Township has identified the following major issues we would like addressed as part of the STMP.

1. Financial/Revenue Sustainability
2. Staffing Levels/Increases Needed
3. Public Works Department and Winter Maintenance Procedures
4. Economic Development
5. Assessment of Township Fleet and Equipment
6. Land Use Practices and Code Enforcement Procedures
7. Assessment of Parks Recreation Facilities and Programming
8. Records Management

A. PROPOSAL SUBMISSION

1. Email proposal with the Technical Proposal and Price Proposal must be submitted no later than 12:00 PM on Monday, December 19, 2022.
2. All proposals shall be valid and binding for a period of 183 days.

B. QUESTIONS

Any questions concerning the Request for Proposal should be directed to Randee J. Elton, Township Manager, 267-812-2914 or [relton@bristoltownship.org](mailto:relton@bristoltownship.org).

I. GENERAL CONDITIONS

- A. No verbal instructions or verbal information to proposer (hereafter proposer or contractor) will be binding on **Township**. These written specifications will be considered clear and complete unless written attention is called to any apparent discrepancies or incompleteness before the opening of the proposals. Should any alterations to these specifications be made in the form of written addenda, they will be emailed to all contractors. These addenda shall then be part of these specifications.
- B. Submission of a proposal will be considered as conclusive evidence of the contractor's complete examination and understanding of the specifications.
- C. **Township** reserves the right to reject any or all proposals; the right to request additional information from any proposer; the right in its sole discretion, to accept the proposal considered most favorable; and the right to waive minor irregularities in the procedures or proposals if it is deemed in the best interest of Bristol Township.

**Township** reserves the right to negotiate with proposers to establish variations from the original proposal(s), including proposed cost, which may be in the interest of the Municipality.

- D. The award will be made to the responsive and responsible contractor whose proposal, conforming to specifications, will be most advantageous **Township**. Price and other factors will be considered, such as delivery time, quality, service, experience and specific skills and disciplines represented on the consulting team, etc. The award may or may not be made to the consultant or contractor with the lowest cost price proposal.
- E. **Township** shall have the right, without voiding the contract, to make amend the items or work covered by the specifications. In case such amendments are made, an equitable price adjustment shall be made between **Township** and the Contractor. All adjustments in price shall be made in writing.

- F. The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or handicap. The contractor will take affirmative action to ensure that applicants are employed without regard to race, color, religion, sex, age, handicap, or national origin. Contractors will take steps to insure employees are treated during employment without regard to race, color, religion, sex, age, handicap, or nation origin. Such action shall include but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.
- G. **CONTRACT TERMINATION:** A contract may be cancelled by **Township** by giving the contractor a minimum of seven (7) business days or provided in written notice to the contractor.
- H. **INDEMNIFICATION:** The contractor shall hold **Township** harmless from and indemnify **Township** against any and all claims, demands and actions based upon or arising out of any activities performed by the contractor and its employees and agents under this Contract and shall, at the request of **Township**, defend any and all actions brought against **Township** based upon any such claims or demands.
- I. **INSURANCE:** The successful contractor, prior to commencing work, shall provide at its expense, the following insurance to **Township**, evidenced by Certificates of Insurance. Each certificate shall require that notice be given, thirty (30) days prior to cancellation or material change in the policies, to **Township**.

Workers' Compensation including Occupational Disease and Employer's Liability Insurance

- 1. Statutory-amounts and coverage as required by Pennsylvania Workmen's Compensation and Occupational Disease Laws.
- 2. Employer's Liability – Bodily injury by:
  - a. Accident \$100,000 each
  - b. Disease \$500,000 minimum policy limit
  - c. Disease \$100,000 each employee

Liability

The successful contractor shall maintain a commercial general liability insurance policy, using an occurrence form of coverage. The required coverage forms are:

- 1. Comprehensive
- 2. Premises – Operation

- 3. Contractual Insurance
- 4. Independent Contractor

The Comprehensive General Liability Policy shall have a minimum limit of liability of \$300,000 per occurrence.

Automobile liability coverage with minimum combined single limits of \$300,000 per occurrence.

The successful contractor shall obtain total minimum coverage limits of \$1,000,000 per occurrence. The additional limits above the General Liability and Automobile Liability policies (required above) may be provided by Excess and/or Umbrella Liability policies.

All policies except Professional Liability shall name **Township**, its officers, agents, and employees as an additional insured. This coverage shall be reflected on the Certificates of Insurance.

## II. SCOPE OF WORK

**Township** has received grant funding by the Commonwealth of Pennsylvania, Department of Community and Economic Development's Strategic Management Planning Program. The purpose of the program is to establish short- and long-term financial and managerial objectives that will strengthen the fiscal capacity of the municipal government along with the integration of long-term community and economic development strategies that strengthen the area's tax base. The Strategic Management Planning Program is designed, in part, on recommended financial management practices of the Government Finance Officers Association (GFOA).

## III. ENGAGEMENT OBJECTIVES

With financial assistance from this program and assistance from the consultant, **Township** will develop and implement a multi-year financial management program and strategies. The objectives of the engagement are to:

- A. Strengthen multi-year financial planning processes for **Township**.
- B. Assist **Township** on a Strategic Management Planning Program basis to identify and address financial difficulties.
- C. Develop the internal capacity within **Township** so that it is able to develop, adopt, monitor, and implement Multi-Year Financial Management plans and incorporate this process into the annual budget process.
- D. Assess possible revenue creation in a community which has limited taxation ability.

- E. Conduct related management studies that will improve the management, financial administration, operations, and economic development activities within **Township**. This part of the study should include but not be limited to an analysis of the appropriate structure, command, scheduling, and staffing levels of each department and a review of current practices compared to established “best practices” and standards of excellence for local government service delivery. It should also include a review of all current collective bargaining agreements and recommendations regarding cost containment and cost sharing for relevant departments and operations.
- F. Implement a system of multi-year revenue and expenditure financial monitoring and trend analysis so that **Township** can anticipate and plan for future financial circumstances. This includes analysis of retirement plans, liability and health insurance coverage and cost.
- G. Determine and establish the adoption of “best practices” for management of **Township** and develop standards that support financial stability.
- H. Provide a mechanism by which **Township** may adopt prioritized short- and long-term goals and objectives for subsequent adoption and implementation.
- I. Explore the opportunities for promoting inter-municipal and regional cooperation strategies and cost-sharing among area local governments.

#### IV. STATEMENT OF WORK TO BE PERFORMED

The Strategic Management Planning Program is guided by a philosophy that establishes five (5) specific measures that a local government can take to manage its financial position and achieve or maintain its long-term economic viability: 1) expenditure reduction; 2) revenue enhancement; 3) implementation of a long-term economic development strategy; 4) adoption of best management practices to achieve operating efficiencies; and 5) pursuit of intergovernmental cost-sharing strategies.

The Strategic Management Planning Program must be designed to meet the individual and specific needs of **Township**. The development of the plan is to be divided into 6 steps:

**Step 1: Financial Condition Assessment** – This assessment is to be performed as a means to establish a realistic baseline of **Township’s** historic and financial condition. A review of each fund starting with the General Fund and all Municipal funds that exist for **Township**. This review should include a minimum of four (4) years of detailed historical financial data.

**Step 2: Financial Trend Analysis** – Performed over a multi-year period, this analysis will project future revenue, expenditure, economic and demographic trends for at least a three

(3) year period so that **Township** can understand its future financial position and take immediate steps to counteract any negative trends.

**Step 3: Management Audit** – With assistance from the consultant, **Township** shall perform a management audit of all departments and operations. The audit is to include narrative summaries of each department comprised of budget and personnel information as well as other relevant data. This data is to be supported by interviews with members of the governing body, Department Heads, and key staff members as may be required in order to facilitate the most comprehensive view of **Township’s** most critical operational needs. Recommended structure, command, scheduling and staffing levels (based on “best practices” for local government service delivery) should be provided for each department so that it will be possible for management to use a “benchmarking” strategy to address operational deficiencies. The management audit shall encompass any and all areas outlined by Bristol Township during the interview and consultant selection process.

**Step 4: Multi-Year Plan Strategy** – The Plan, at its foundation, will identify **Township’s** top three financial management priorities. Additional prioritization should be conducted at the departmental level, and interdepartmental objectives that are Township-wide. These should be detailed in the Plan. Each objective is to contain a detailed action plan that describes: 1) policy objectives to be achieved; 2) the budgetary impact; 3) the timing and deadlines for each action step; and 4) which employee and/or department has the primary responsibility for the objective.

**Step 5: Multi-Year Plan Implementation** – The Strategic Management Planning Program is an ongoing process, and an adopted plan must be evaluated, adjusted and adopted each year. A master implementation schedule should be created that specifies key deadlines for each objective set forth in the Plan. Key to the ultimate implementation of the Plan, this schedule will serve to monitor whether or not individual department objectives are being met, thus providing a means by which the local government can measure its overall progress in implementing the Plan.

#### REPORTS REQUIRED

The following reports as detailed above in Section V are expected during the course of and at the completion of the engagement:

- A. Assessment of the Municipality’s Financial Condition
- B. Financial Trend Analysis
- C. Management Audit
- D. Five-Year Plan
- E. Implementation Plan

VII. SCHEDULE

	Months from contract award
Financial Conditions Assessment and Trends Analysis	2
Management Audit	4
Five Year Plan	6
Implementation Schedule	6

VIII. PROPOSAL

Proposals are to be submitted in two (2) parts. The first part of the proposal (marked “Technical Proposal”) shall include the technical aspects as thereafter explained but shall not include any discussion of fees or out-of-pocket expenses to be billed to **Township**. The second part of the discussion (marked “Price Proposal”) shall include details as to fees charged and out-of-pocket expenses to be billed. Email proposal with the Technical Proposal and Price Proposal must be submitted no later than 12:00 PM on Monday, December 19, 2022. All proposals shall be valid and binding for a period of 183 days.

A. Technical Proposals should include the following information in the order detailed:

1. Title Page – List the RFP subject, the name of the firm, the local address, telephone number, name of the contact person and date.
2. Table of Contents – Include a clear identification of the material included in the proposal by page number.
3. Letter of Transmittal – Limit to two (2) pages. State a positive commitment to perform the required work within the time requested. Also, provide the name(s) of the person(s) who will be authorized to make representation for your firm, their title, and telephone numbers.
4. Profile of Proposer – State whether your firm is local, national or international in size. Give the location of the office from which the work is to be done and the number of partners, managers, supervisors, seniors, and other professional staff employed at the office. Briefly describe the range of activities performed by the local office such as legal, auditing, accounting, tax services, and management advisory services.
5. Summary of the Proposer’s Qualifications – Describe recent local and/or regional experience similar to the type requested in the proposal and provide the names and

telephone numbers of client references who might be contacted regarding your firm's work. At least three (3) references are requested.

Provide a brief resume for each of the persons to be assigned to the engagement. At a minimum, detailed information should be provided at the consultant in charge of the review, and the financial consultant who will oversee the field work. Resumes should include educational and professional experience with particular emphasis on financial consultation to governmental units.

Provide details as to the capability of your firm to provide financial management advisory services over a multi-year period.

6. Management Review Approach – Provide a statement reflecting an understanding as to the scope of work requested and briefly describe your firm's management review approach and provide specific illustrations of the review procedures which will be employed. Submit at least one (1) sample of a recent management audit report prepared by your firm for a governmental unit.
7. Utilization of Municipal Resources – The Proposer should provide an estimate of the number of hours which will be required of: (1) **Township's** staff to assist with the provision of data; (2) Management staff to provide interviews; and (3) **Township** interviews/meetings.
8. Additional Data – Include in this section any pertinent information not covered in any of the previous sections. If there is no additional information to present, please so state.

B. Price Proposals shall include the following information for each year:

1. Compensation – The estimated maximum number of hours and hourly rates by staff classification necessary to complete the engagement. The estimated out-of-pocket costs and the resulting all-inclusive maximum fee for which the requested work will be done.
2. Billings and Payment Terms – Proposers shall include required payment terms, although monthly progress billings are preferred for both the consultant fees and out-of-pocket expenses. Billings should show the total professional hours, by classification, together with applicable rates and extensions, actual travel expenses incurred, and a reasonable itemization of other out-of-pocket expenses.

## IX. EVALUATION OF THE PROPOSALS

The Technical Proposals will be evaluated in terms of: (1) the Proposer's demonstrated understanding of **Township's** requirements and plans for meeting them; (2) the professional qualifications and related experience of the professionals assigned to the engagement; (3) the

prior experience and reputation of the Proposer in performing municipal management consultation, and (4) the organization size and structure of the Proposer.

After review of proposals submitted, an award will then be made to the firm which, in the opinion of the Governing Body of **Township's** submitted the most beneficial proposal, cost and other relevant factors considered. Please note that the award may or may not be made to the firm submitting the lowest cost proposal. **Township** reserves the right to reject all proposals submitted and to request additional information from proposers. Notice is also given of the possibility that an award may be made without discussion or after limited negotiations. It is, therefore, important that all proposals contain the most favorable terms possible and should be complete in all respects.