



City of Barre, Vermont

“Granite Center of the World”

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REQUEST FOR PROPOSALS MUNICIPAL CAPITAL IMPROVEMENTS PLAN & PROGRAM PREPARATION

Introduction/Background:

The City of Barre is requesting proposals from Municipal Planning Consultants specifically experienced in Capital Improvements Planning/Programming to assist the Administration, City Council, and Planning Commission to develop and prepare a Capital Improvements Plan & Program (CIP). The objective of this process is to produce a CIP planning document to provide a comprehensive capital expenditures/improvements summary and forecast for a baseline planning period of five (5) fiscal years. Capital expenditures/improvements are intended to include capital equipment needs, planned or anticipated infrastructure projects or upgrades, and planned or foreseeable community improvement projects. The CIP should incorporate planned or anticipated Capital expenditures from the:

1. General Fund
2. Capital Equipment Fund(s)
3. Water Enterprise Fund
4. Wastewater Enterprise Fund

Going forward, the CIP will be used as a planning document to be updated annually in support of the annual budget cycle for planning and managing the capital financial needs of the City, and a tool to support capital equipment replacement/acquisition and capital projects implementation.

The City of Barre’s population as of the 2020 census is 8,491 residents; our FY22 General Fund Operating Budget of \$12.8M. The City also operates both a water system and wastewater system with respective Enterprise Funds of \$2.6M and \$2.8M respectively.

The City has a staff of 100+/- employees organized in seven (7) Departments led by the City Manager as follows:

Planning/Permitting/Zoning Department
Buildings & Community Services Department (including 3 Cemeteries)
Department of Public Works
Fire/Ambulance EMS Department
Police Department
Finance Department
City Clerk/Treasurer Office

Upon development and acceptance of a Capital Improvement plan, it is the intent of the Barre City Council to formally adopt a Capital Budget and Program in accordance with 24V.S. A §4443

Scope of Work:

Following is a suggested, but not exhaustive, Scope of Work to help convey our objectives as to the intended process, approach, and work tasks. However, this is by no means a restrictive nor exhaustive list of tasks. We are looking for your thoughts and/or recommendations as to process and work product based on your municipal/capital planning experience and expertise. While we have a preference for in-person work sessions and meetings, in today's COVID environment, we are open to arranging virtual meetings for any work sessions required by the consultant except as otherwise noted below.

1. Organize and conduct a planning **Kick-off Meeting (in-person)** with the staff and/or a representative(s) of the Barre City Council and/or Planning Commission to review key contacts, resource documents, communication logistics, project approach, project schedule, key milestones, work product/CIP format, etc. (allow 3 hrs.)
2. Working meetings as necessary for the consultant to exchange information and capital expenditure data developed by Department Heads to support the consultant's development of the work product (see below)
3. As part of the CIP, prepare a recommendation for an **Annual CIP Review and Updating Process and Schedule** to insure the CIP and Capital expenditures programming is monitored, managed, and updated on an annual basis to support the annual General Fund budget cycle.
4. Presentation and Review with staff of the Draft FY23 CIP
5. Preparation of a revised Draft based on staff review feedback.
6. Presentation and review of the Draft FY23 Capital Improvements Plan to the Barre City Council (**In-person**)
7. Within 30 days of the Council presentation and/or receipt of Council feedback, submission of the Final FY23 Capital Improvements Plan

Work Product

At a minimum, the Capital Improvements Plan shall include:

1. A clear summary narrative of needs
2. A list, by Department, of all capital expenditures to be proposed (by Fiscal Year) for the next five (5) years

3. To the extent possible, cost estimates (or budget allowances) for the scheduled capital expenditures
4. Identification of known, proposed, or potential funding sources for each identified capital expenditure including potential grants or other funding sources.
5. Estimated operating and maintenance costs of any facilities to be constructed or acquired
6. A methodology (scoring matrix?) for stakeholders to evaluate, score, and prioritize projects, considering criteria such as: Infrastructure: Does it address an identified (critical) existing infrastructure need of the City?; Cost Savings: does it help save the City money?; Equity: does it improve under-served or disproportionately impacted neighborhoods or residents?; Health, Environment & Emergency Readiness: does it improve air quality, water quality, or disaster readiness?; Urgency: does a delay make it worse in the future?; Economy: does it grow the City's economy?; Revenue: does it help diversify or add City revenues to support services?; Local Support & Coordination: is it a widely shared priority?; Data: has the project been identified based on a data-driven needs or comparative condition assessment; Plan implementation: does it implement the City's Master Plan and prior planning?

The CIP shall be prepared in conformance with Vermont Statute 24 CSA Ch. 117 §4430.

Reference Documents:

Following is a list of relevant Departmental or municipal documents and links to be referenced and incorporated in the development of the CIP:

Vermont Statute 24 CSA Ch. 117 §4430:

<https://legislature.vermont.gov/statutes/section/24/117/04430>

FY22 Capital Equipment Plan (12-10-21):

[https://www.barrecity.org/client_media/files/DPW/Auction/Capital%20Equipment%20Plan%20\(CEP\)%20\(9-14-21%20Council\).pdf](https://www.barrecity.org/client_media/files/DPW/Auction/Capital%20Equipment%20Plan%20(CEP)%20(9-14-21%20Council).pdf)

DPW Capital Improvements (Preliminary) List:

https://www.barrecity.org/client_media/files/CityMgr/Website/DPW%20Capital%20Improvement%20Needs%20List%202001-2022%20needs%2001-11-21%20draft.pdf

Streets Division Capital Planning FY23-27:

https://www.barrecity.org/client_media/files/DPW/Streets%20Division%20Capital%20Planning%20FY23-27%2012-03-21%204PM.pdf

Water Division Capital List FY23-27:

https://www.barrecity.org/client_media/files/DPW/Water%20Div%20Cap%20Plan%20FY23-27%2012-02-21%203PM.pdf

Sewer Division Capital List FY23-27:

https://www.barrecity.org/client_media/files/DPW/Water%20Div%20Cap%20Plan%20FY23-27%2012-03-21%2011AM.pdf

2020 City Municipal Plan:

<https://www.barrecity.org/2020-municipal-plan.html>

It is anticipated that staff will work closely with the consultant in interpretation and/or refinement of those referenced Departmental working documents which may not yet be in final form.

Budget:

We have no fixed budget for this process, and intend to select the consultant/proposal judged to best meet the needs and provide the best value to the City

Schedule:

The objective is to have the baseline CIP completed by the start of Fiscal Year 23 (July 1, 2022), or as soon thereafter as possible, commensurate with your proposed scope of services. The absolute deadline is on/or October 1, 2022 in order to support the City's annual municipal budgeting cycle. Within that guidance, schedule is not a disqualifying criteria. Schedule proposals will be evaluated relative to the City's overall goal and in relative context with the consultant's scope of work and work product proposals.

Selection Criteria:

Selection criteria include, but are not limited to:

1. **Qualifications and Experience** - assessment of the firm's resources and the Project Team committed to this assignment
2. **Scoping effort** – an assessment of the proposal level of effort, content/quality of the proposal, and overall responsiveness.
3. **Proposed Approach and Task List** – Is the process for data collection, researching and coordinating development of the CIP sufficient and described clearly? Are there identified, reasonable coordination and product development

4. **Demonstrated CIP Work Product** - Assessment of past and proposed work samples/formats relative to the document objectives envisioned by the City
5. **Project Schedule*** - Assessment of the proposed project schedule relative to the City's schedule objectives
6. **Proposed Fee***

***Note:** Neither schedule nor fee are exclusive or disqualifying selection criteria in and of themselves. These items will be assessed in relation to the overall quality and scope of the proposal and the remaining Selection Criteria.

A consultant will be recommended for Council selection based on the Proposal Review Team's assessments of the proposer and proposal which best addresses the combination of qualifications, experience, process approach, proposed work product, schedule and cost, and which proposer/proposal is deemed to best meet the selection criteria above and the objectives of the City for this CIP process.

The review Team is anticipated to consist of the Director of Public Works, Planning Director, Buildings and Community Services Director, and the Fire/EMS Chief.

Questions/Clarifications:

Should you have questions or require clarifications, please feel free to contact:

Steven E. Mackenzie, P.E
City Manager
City of Barre, VT
City Hall
6 North Main Street, Suite 2
Barre, VT 05641

Email: manager@barrecity.org
Office: 802-476-0241
Cell: 802-477-2255

Proposal Response Deadline/ Submission Requirements:

Please include the following in your proposal:

1. Summary of the firm and assigned staff qualifications
2. Summary of relevant municipal CIP Planning experience
3. Sample(s) of your CIP Work Product (or CIP links)

4. Presentation of anticipated Project Work Schedule with Key Milestones
5. Three municipal references
6. ***Separate** Proposed Fee and Rate Schedule

*** Note:** The Proposed Fee and Rate Schedule should be submitted as **attachments separated** from your formal proposal

Proposals are due No Later than 2:00 p.m. on/before Friday, May 13, 2022.

Proposals and Fee attachments shall be submitted electronically to:

Execassist@barrecity.org

Jody Norway
Executive Assistant to the City Manager
6 North Main St; Suite 2
Barre, VT 05641
802-476-0241