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**REQUEST FOR PROPOSAL ("RFP")
O'HARA TOWNSHIP - FOX CHAPEL BOROUGH
JOINT IMPLEMENTABLE PLAN**

The Township of O'Hara ("**O'Hara Township**") and The Borough of Fox Chapel ("**Fox Chapel Borough**") (each, a "**Community**" and collectively, the "**Communities**") are accepting proposals for a contract to perform certain professional consulting services work to assist the Communities in the development of a long-term multi-municipal implementable plan. Information regarding the Communities, the scope of work, proposal submission instructions, consultant requirements, evaluation criteria, and a sample contract are included with this RFP.

Sealed proposals (two printed copies and one electronic copy) must be received by the Township and Borough Managers (the "**Managers**") of the Communities no later than 4 pm ET on Monday, May 3, 2021. The contact information for the Managers is as follows:

Township of O'Hara
Julie Jakubec CPA, CGMA, O'Hara Township Manager
O'Hara Township Building
325 Fox Chapel Road, Pittsburgh, PA 15238
Phone number – 412.782.1400
Email - jjakubec@ohara.pa.us

Borough of Fox Chapel
Gary Koehler, Fox Chapel Borough Manager
Fox Chapel Borough Building
401 Fox Chapel Road, Pittsburgh, PA 15238
Phone number – 412.963.1100
Email – gkoehler@fox-chapel.pa.us

If additional information is needed, please contact the Managers.

O'Hara Township

Fox Chapel Borough

By: _____
Julie Jakubec CPA, CGMA
Township Manager

By: _____
Gary Koehler
Borough Manager

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Section 1

Development of the Joint Plan; Action to Date

Fox Chapel Borough and O'Hara Township have a long history of cooperation and collaboration in many areas. In keeping with this tradition, the Communities have committed to work together to establish a long-term joint implementable plan (the "**Joint Plan**"). The Communities have established a joint committee of volunteers selected by their Councils (the "**Joint Committee**") to facilitate the process. The Joint Committee has been meeting on a regular basis since October 2020. The Joint Committee's main objective has been to establish a framework for working together and identify common goals and interests of the Communities. To date, these include:

1. The Joint Plan should be an "implementable plan", one that is focused, practical and dynamic.
2. The Joint Plan should be owned by the residents, business owners and tenants of the Communities and developed with their input. The Joint Plan should also be open to input and participation from surrounding communities.
3. The development of the Joint Plan will be most efficient and effective with the assistance of a high-quality professional planning consultant (the "**Planning Consultant**").

The Joint Committee also prepared a draft statement of objectives for the Joint Plan:

The objective of the Joint Committee is to create a 10-year implementable plan for the Communities. The plan should identify near-term and long-term opportunities, needs and challenges for Fox Chapel Borough and O'Hara Township and propose clearly defined, practical projects that will guide the Communities in working towards our goals. Our Joint Plan should address stakeholder needs and encourage their active participation on an ongoing basis.

Section 2

Certain Attributes of the Communities

The Joint Committee has been working to catalog some of the characteristics of our Communities that may help us identify opportunities that could be achieved with joint action on the part of our Communities. These characteristics include: ¹

1. O'Hara Township has a vibrant commercial community and an active industrial/office presence which accounts for a significant portion of O'Hara Township's tax income. The industrial and office presence is principally in the RIDC Industrial Park and the commercial corridor is mainly along Freeport Road. This commercial activity provides dining, shopping and professional and other services to members of the Communities and surrounding municipalities.
2. Fox Chapel Borough is primarily a residential community and does not have commercial activity beyond private clubs and home-based businesses. The Borough includes three private clubs (Fox Chapel Golf Club, Fox Chapel Racquet Club, and The Pittsburgh Field Club), each of which pays its share of real estate tax to Fox Chapel Borough and the Fox Chapel Area School District (the "**School District**").
3. The School District is nationally-acclaimed and draws prospective residents into the Communities. The physical plant of the School District comprises buildings located in O'Hara Township (Senior High School, O'Hara Elementary School, Kerr Elementary School) and Indiana Township (Dorseyville Middle School, Fairview Elementary School, Hartwood Elementary School). The School District has historically been a good partner with the Communities, including making its buildings and grounds available for a range of athletic and recreational activities, facilitating the operation of an adult education program which has been in operation for sixty years, and opening up its artistic and musical programs to the residents of the School District.
4. In addition to the School District, a nationally-acclaimed independent school – Shady Side Academy – has an important presence in Fox Chapel Borough, where it operates its Senior School, Middle School and a branch of its Junior School.
5. Both Communities have well-developed trail and park systems. Certain trail systems of the Communities connect with each other; others do not. The Communities place a high value on their trail and park systems. Fox Chapel Borough has a Parks Master Plan (see Annex A) and O'Hara Township has a comprehensive trail study (see Annex A). Our parks and backyards are home to a wide variety of wildlife. Our deer control programs harvest more than 100 deer per year that are donated to local food banks.
6. By logic of geography, The Waterworks Mall should reside in O'Hara Township. Due to historic annexation, however, the City of Pittsburgh owns the land underlying The Waterworks Mall. The Waterworks Mall provides residents of the Communities and surrounding municipalities with a number of bank branches and a range of shopping and dining options. The Waterworks Mall also draws residents from the City of Pittsburgh

¹ Annex A is a listing of certain materials relevant to the Communities which can be accessed through the Managers.

who access the Waterworks via the Highland Park Bridge. The Waterworks Mall generates traffic congestion principally along the Freeport Road corridor.

7. A portion of O'Hara Township is adjacent to the Allegheny River. There is currently a significant amount of interest in residential and marina development in that area. There has been ongoing interest in developing an unimpeded riverfront throughway from O'Hara Township to center-city Pittsburgh – from O'Hara Township through Aspinwall, Sharpsburg, Etna and Millvale, and into the City of Pittsburgh. Land rights owned by the railroad which parallel the Allegheny River is a principal impediment to the initiative.
8. O'Hara Township is part of the Friends of the Riverfront Water Trail system. There is a stop located in the Chapel Harbor residential and commercial development. This stop has kayak racks and is close enough for users of the trail to walk to the Township's commercial corridor.
9. Major traffic thoroughfares traverse the Communities, including Dorseyville Road, Fox Chapel Road, Guyasuta/Field Club Roads, and Delafield Road, among others. Vehicular traffic along these roads and the lack of paved shoulders impede walking and biking.
10. Access to Route 28 provides both communities with direct access to downtown Pittsburgh along with access to Oakland and various other communities.
11. Stormwater management is a key challenge for both Communities. The convergence of Western Pennsylvania topography, watershed bottlenecks, development activity within the Communities and in surrounding municipalities, and emerging evidence of the consequences of climate change have caused risk of life and serious property damage in the Communities over recent years (including the July floods in 2018 and 2019). Effective stormwater policy for the Communities requires cooperation with governmental and quasi-governmental bodies outside of the control of the Communities, including Allegheny County, surrounding municipalities, the City of Pittsburgh, the Commonwealth of Pennsylvania, and regional water and sewer authorities.
12. The Communities value healthy vegetation, including trees and forested areas. This is tempered by the need for logical trimming to improve driving sight lines and driving safety.
13. There are a number of institutions in the Communities that foster body, mind and spirit, including places of worship, the Lauri Ann West Community Center, the Cooper-Siegel Community Library, Camp Guyasuta Scouts of America, and Beechwood Farms Nature Reserve.
14. Each Community manages its own police force. There is close cooperation between the respective police forces as well as cooperation with police officers of surrounding municipalities and with Allegheny County. Fire safety is handled by multiple volunteer fire departments/companies. Emergency medical services are handled by paid and volunteer medical personnel in two distinct EMS companies located in the Communities. There is close cooperation among all first responders.
15. The federal government owns the Senator Heinz Veterans Administration health facility on a large parcel of land situated along Delafield Road. The VA borders Fox Chapel Borough and O'Hara Township. In the late 2000's, the VA was reformed from a historically elder care facility for veterans to a full service hospital with a number of

outpatient facilities and services. These enhanced health care operations involve a large number of employees, patients and visitors, and the traffic flow, and traffic infractions, along Fox Chapel and Delafield Roads have materially increased.

16. A large amount of public works activity (e.g., road paving, pipe replacement, tree removal, etc.) is handled internally by the public works departments of the Communities. For a number of years, Fox Chapel Borough and O'Hara Township have jointly bid their road improvement project to enjoy an economy of scale.
17. O'Hara Township employs a professional engineer and uses consulting engineers as needed. An outside firm performs Fox Chapel Borough's engineering functions. Both O'Hara Township and Fox Chapel Borough mainly utilize the services of Lennon, Smith, Souleret Engineering as their consulting engineer. Both communities have detailed GIS mapping through the Traisr program.
18. Each municipality operates a sanitary sewer system. Both communities utilize ALCOSAN as their treatment facility. Because of this, both communities are subject to the EPA Consent Order. Fox Chapel Borough also utilizes Allegheny Valley Joint Sewage Authority for sanitary treatment services.
19. Each community utilizes one or more water authorities for their water service. Fox Chapel Borough utilizes Fox Chapel Authority. O'Hara Township has three (3) water providers: Fox Chapel Authority, Shaler/Hampton Water Authority, and Pittsburgh Water and Sewer Authority.
20. Both Fox Chapel Borough and O'Hara Township have enacted stormwater fees to help raise capital to address stormwater and MS-4 issues in their communities. A joint Army Corps of Engineers study has been commissioned by the communities to address flooding concerns due to the creek that runs along Fox Chapel Road and is expected to be finalized in June of 2021.
21. The O'Hara Township is a Home Rule community. It is governed by its Home Rule Charter, which was adopted in 1974 and went into effect in 1976. Fox Chapel Borough operates under the Commonwealth's Borough Code. Both communities are financially stable and maintain professional financial staff.
22. The O'Hara Township is a Sustainable Gold Community under criteria developed by The Pennsylvania Municipal League. Both communities value renewable energy and the creation of green alternatives to conventional energy sources. O'Hara Township has taken several significant steps in this direction in recent years including amendments to the Township Ordinances making it possible for residents to more easily install zero-carbon energy systems and installing electric vehicle solar charging stations in Township parks.
23. Both communities have been Banner Communities for a number of years under criteria established by the Allegheny League of Municipalities.
24. Public transportation is limited in each community. The Port Authority of Allegheny County provides bus service only to O'Hara Township. Although O'Hara Township Council has been protesting proposed cuts and requesting additional service from the Port Authority on an ongoing basis, this service is not as robust as could be wished.

25. The Communities have very stable housing stock. Most homes placed on the market are sold within a few weeks. Housing sales are strong due to the communities' proximity to the universities and medical centers in Oakland and the business center of the City of Pittsburgh. In addition, the School District attracts homebuyers with children.
26. Private swim clubs are available to residents. These include the Yacht Club Swim Club (O'Hara Township), the Racquet Club (Fox Chapel Borough), Chapel Gate (O'Hara Township), and the Community Swim Club (O'Hara Township). Both golf clubs also have swimming facilities available to members.
27. O'Hara Township includes two marinas along the Allegheny River.

Section 3

Scope of Work

The Joint Committee considers the Pennsylvania Department of Community and Economic Development's ("DCED") "*Creating an Implementable Comprehensive Plan*" a source document for our planning process. We intend to create an "implementable plan" that will be a sourcebook for creating projects that encourage members of our Communities to participate in successful implementations that benefit all of our stakeholders.

We expect our Joint Plan to identify:

- Issues faced by the Communities,
- Projects that may address these issues,
- Stakeholders who may be interested in participating in projects,
- Persons or groups responsible for addressing the issues and approaches for working with adjacent municipalities, authorities and agencies.

The Plan should include a timetable for implementation that identifies short, medium, and long range projects. Where possible, sources of financing should be identified. Emphasis should be on engaging stakeholders to determine the priorities of the Communities. We envision a document that creates a process for the Communities that provides a series of realistic strategies and tactics to engage residents, business owners, Council members and staff, and other stakeholders in a series of projects that will sustain and enhance our Communities on an ongoing basis.

Our ideal Planning Consultant will provide a full range of services necessary to develop the Joint Plan. The Planning Consultant will be asked to focus its work on surveying the needs and wants of residents of the Communities, guiding the Joint Committee and our community members through a decision making process, helping to develop creative ideas and workable action plans, and helping the Communities to recruit partners and work with other governmental and quasi-governmental bodies to implement projects included in the Joint Plan. Areas that may need expert focus from the Planning Consultant (in no particular order) include but are not limited to:

1. Stormwater management
2. Traffic congestion and calming
3. Revision of ordinances to aid in development, redevelopment and adaptation
4. Harmonizing zoning and land use with development and redevelopment opportunities
5. Public safety planning and shared municipal services
6. Development and implementation of zero-carbon energy sources
7. Preservation of historical assets

8. Establishing walkable and bikeable communities
9. Evaluation of public transportation needs
10. Establishment of park systems as regional assets
11. Evaluation of infrastructure needs and improvement of regional planning and implementation with other State, County, municipal and quasi-governmental bodies
12. Maintenance of the attractiveness of the Communities for business and commercial tenants

The Planning Consultant's work and the Joint Plan document should be organized based on the priorities and related goals, themes and projects that emerge from the planning process rather than a traditional template of a land use plan, housing plan, or transportation plan. The Joint Committee would like the Joint Plan document to become a well-used sourcebook for our Planning Commissions, Councils, residents, business owners, and other Community stakeholders who will implement the Joint Plan over the next decade.

The Joint Plan should provide suggested action plans for top recommendations with a series of projects, programs and initiatives that emerge from the planning process. The Joint Plan should suggest priorities and a timetable for action based on expected results. Action plans should include reasonable depth and detail, specific action steps, identification of stakeholders, estimated costs, and proposed means of financing. The Planning Consultant will ideally include some immediate action recommendations to generate short-term, visible results in order to motivate stakeholder implementation of projects included in the Joint Plan.

The Planning Consultant will facilitate Joint Plan development activities including but not limited to town hall meetings and surveys of residents, students, seniors, business owners, and representatives of the School District. The Joint Committee intends for stakeholders in the Communities to feel that they "own" the Joint Plan; with the elected Community officials and committed Community volunteers serving as spokespersons for the Joint Plan and benefitting from a consensus commitment of the Communities.

The Planning Consultant should ensure that the Joint Plan meets minimum requirements of the Pennsylvania Municipalities Planning Code. In this regard, note that the Planning Consultant may have to address minimal subject matter not addressed as focus areas in this Request for Proposal. The Joint Plan and the activities of the Planning Consultant should be in compliance with legal and regulatory requirements including requirements of DCED.

Section 4

Qualifications and Attributes of the Planning Consultant

Although the following is not a complete list, the Planning Consultant should have the following qualifications and attributes.

1. The Planning Consultant should have demonstrated experience working with Pennsylvania municipalities in the development of multi-municipal implementable plans.
2. The Planning Consultant should have (or demonstrate the ability to develop) an understanding of our Communities, including both unique and common attributes of our Communities.
3. The Planning Consultant should demonstrate the ability to identify Joint Plan objectives and related action steps which when implemented will have positive “multiplier” impacts on our Communities.
4. The Planning Consultant should have an effective understanding of key political, geographic and legal impediments and opportunities faced by our Communities. These include our need to work with other political bodies such as the Commonwealth of Pennsylvania, Allegheny County, municipalities surrounding our Communities (Indiana Township, Hampton Township, Borough of Aspinwall, Sharpsburg Borough, Harmar Township, Shaler Township and Blawnox Borough), the School District, the VA, and regional water and sewer authorities. The Planning Consultant should have demonstrated success working in these arenas.
5. The Planning Consultant should demonstrate an ability to collaborate with other subject matter experts in areas which may be outside of the expertise of the Planning Consultant. In accordance with the idea that the Communities will come to "own" the Joint Plan, the Communities encourage the Planning Consultant to advertise the potential need for any subject matter experts to Community residents
6. The Planning Consultant should have a current understanding of funding sources available to our Communities for the implementation of the Joint Plan, with demonstrated success in coaching communities to successfully access these funding sources.
7. The Planning Consultant’s team should be led by an appropriately credentialed planning professional(s).

Section 5

Required Submittals

1. Letter of Transmittal

This letter should include the following:

- A statement demonstrating the Planning Consultant's understanding of the work to be performed.
- Contact information.

2. Profile of Planning Consultant

The profile should include the following:

- A statement of the Planning Consultant's experience in conducting work of the nature sought by this RFP.
- The location of the office(s) that will perform the work.
- Professional credentials for Planning Consultant's project lead
- Resumes of individuals proposed to conduct the work and the specific duties of each in relation to the work.
- A reference list of other municipal clients of the Planning Consultant with contact information.
- Any other information relating to the capabilities and expertise of the Planning Consultant in doing comparable work.

3. Methods and Procedures

The proposal should include a detailed description of the methods and procedures that the Planning Consultant will use to perform the work. Inclusion of collaboration with subject matter experts outside of the Planning Consultant, if outside collaboration is required, should be described.

4. Work Schedule

The schedule should include time frames for each major work element, target dates for public meetings, and dates for completion of draft and final documents.

5. Deliverables

Identify deliverable work products. Delivery of work products is to be incorporated into the Work Schedule.

6. Cost

For each major work element, the costs must be itemized and indicate:

- For each person assigned to the work, the title/rank (organizational level) of the person in the organization, the hourly rate, and the number of hours to be worked.
- The reimbursable expenses expected to be claimed.

The itemized costs should be totaled to produce a proposed contract price. If awarded a contract, the Planning Consultant is bound by this price in performing the work. The contract price may not be exceeded unless the contract is amended to allow for additional costs and approved by the Councils of both communities at public meetings.

If awarded a contract, the Planning Consultant may not change the staffing assigned to the project without prior approval by the Communities. However, approval will not be denied if the staff replacement is determined by the Communities to be of equal ability or experience to the predecessor.

The method of billing must be stated. The preferred practice of the Communities is to pay upon completion of the work and receipt of the required report. However, the Communities will consider paying on a periodic basis as substantial portions of the work are completed.

7. Contract

The Contract for Professional services form is set forth on Annex B.

Section 6

General Terms

1. The Communities reserve the right to reject any or all proposals and to select the proposal that it determines to be in the best interest of the Communities.
2. The contract with the Planning Consultant is subject to the approval of the respective Councils of the Communities and is effective only upon approval of both Councils.
3. Proposers are bound by the deadline and location requirements for submissions in response to this RFP as stated above.
4. Proposals will remain effective for the review and approval of the Communities for 60 days from the deadline for submitting proposals.
5. If only one proposal is received by the Communities, they may negotiate with the proposer or seek additional proposals on a formal or informal basis during the 60-day period that proposals are effective.
6. The Joint Plan and the activities of the Planning Consultant must be in compliance with legal and regulatory requirements of the Municipal Planning Code.
7. The proposer is encouraged to clarify, modify, or add to any scope of work item that it deems appropriate to develop a high-quality plan at the lowest possible cost. All changes should be clearly identified and explained. The proposed scope of work must accomplish the goals and work as stated in this document.

Section 7

Evaluation Criteria

1. Technical Expertise and Experience

The following factors will be considered:

- The Planning Consultant's experience in performing similar work
- The level of expertise of the individuals assigned to conduct the work
- The clarity and completeness of the proposal and the Planning Consultant's demonstrated understanding of the work to be performed

2. Procedures and Methods

The following factors will be considered:

- The techniques for collecting and analyzing data
- The sequence and relationships of major steps
- The methods for managing the work to ensure timely and orderly completion

3. Cost

The following factors will be considered:

- The number of hours of work to be performed
- The level of expertise of the individuals assigned to conduct the work

4. Oral Presentation

Any or all firms submitting proposals may be invited to give an oral presentation of their proposal.

Annex A

Background Materials

1. Agreement for a Joint Implementable Plan between the municipalities.
2. The Fox Chapel Borough Comprehensive Plan of 1987 –
www.fox-chapel.pa.us Planning Commission Home Page
3. O'Hara Township Comprehensive Plan, August, 2013 –
www.ohara.pa.us Home Page
4. *O'Hara Township, Portrait of an American Community*, Township of O'Hara, 2008 -
Available at the Cooper-Siegel Community Library, 403 Fox Chapel Road, Pittsburgh, 15238
5. *Fox Chapel, A History of an Area and Its People*, Frances Hardie, 1987 -
Available at the Cooper-Siegel Community Library, 403 Fox Chapel Road, Pittsburgh, 15238
6. O'Hara Township Trail Feasibility and Planning Project, April, 2002 –
www.ohara.pa.us
7. Fox Chapel Borough Park Master Plan 2007 –
www.fox-chapel.pa.us Parks Commission Home Page
8. Hardie Valley Park Master Plan June 2020 –
www.fox-chapel.pa.us Parks Commission Home Page

Copies of Fox Chapel Borough's Subdivision and Land Development Ordinance and O'Hara Township's Zoning Ordinance are available upon request.

Annex B

Set forth below is a proposed contract for review. If it is satisfactory, it should be completed, executed, and submitted with the proposal. If the Planning Consultant prefers an alternative contract, it may submit it as a part of its proposal. The Communities reserve the right to enter into the below contract with the successful Planning Consultant or to negotiate the terms of another form of professional services contract.

CONTRACT FOR PROFESSIONAL SERVICES

[to be prepared by Solicitors of the Communities]