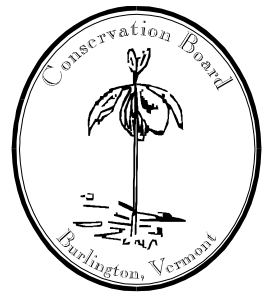


Burlington Conservation Board

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Caryn Connolly
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Elizabeth Cunningham, Student*



Request for Proposals (RFP) for Professional Planning Services Burlington VT, Open Space Plan

The City of Burlington is seeking proposals from an interdisciplinary firm or team of consultants that may include landscape architects, planners, urban designers, ecologists, environmental law experts, graphic designers and/or climate resiliency professionals to complete a comprehensive Open Space Plan for the City.

Issue date:	Friday, April 12 th , 2024
Questions due:	Friday, April 19 th , 2024 @NOON
Answers posted:	Tuesday, April 23 rd , 2024
Proposals due:	Tuesday, May 7 th , 2024 @NOON
Proposal review, award	Week of May 20 th , 2024
Contract signing, kickoff:	Week of May 27 th , 2024

Inquiries/submissions to: **Scott Gustin, AICP, CFM**
Principal Planner
Dept. of Permitting & Inspections
sgustin@burlingtonvt.gov
(802) 865-7189

The City requires that all related work, inclusive of planning and reporting, be completed by **August 30, 2025**. The City reserves the right to amend all dates. While this timeline may be subject to change, all participating parties will be notified.

*No Bids will be accepted or contracts awarded until Board of Finance approval and the execution of a contract and all required certifications between the City and a successful bidder are completed.

I. Project Overview

The Burlington Conservation Board, in collaboration with Parks & Recreation, City Planning, and Permitting & Inspections, is looking to address the management and resiliency of Burlington's urban forest and open spaces through the development of a comprehensive Open Space Plan.

Burlington is a vibrant small city on the eastern shores of Lake Champlain. The city benefits from an abundance of open space totaling almost 50% of its geographic area. The city's environmental ethic has pushed for preservation, adaptation, and access to its diverse open

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spaces. As Burlington continues to intensify in density to accommodate its increasing population, the City aims to continue its long-standing commitment to providing equitable access to quality open spaces.

While Burlington's original Open Space Protection Plan (2000) encompassed mainly 'green' spaces including natural areas, urban agriculture, parklands and green infrastructure, it acknowledged that urban greenspaces were necessary as an aesthetic and 'softening' of dense neighborhoods. By including urban greenspaces in this new plan, it is anticipated that private outdoor spaces will begin to play a bigger role in the plan and will serve to support a collective spirit of stewardship in addition to a sense of responsibility amongst city residents. Broadening the definition of open space to include civic spaces and greenways will not only support human health, but also enable us to connect networks and habitats that are unique to urban environments.

The Open Space Plan will build on past plans (listed in Section III) and take a multi-disciplinary approach to documenting the City's open spaces, updating open space goals, and identifying specific resource targets and timelines through a robust community-focused engagement process. The Open Space Plan will also fold in the Urban Forest Plan, as the two are interdependent and interrelated and should be mutually complementary rather than two separate plans. Additional goals for this Plan are identified in the Project Scope.

The project will be data-driven. The City has contracted with the University of Vermont Spatial Analysis Lab (UVM Spatial) to collect tree canopy and open space data through LiDAR and other imagery and to analyze the collected data. The selected consultant is expected to collaborate with UVM Spatial as part of this project in a dynamic way, as well as take the generated data and analysis, apply it to the plan, ensuring that the information is easily digestible in the final deliverables.

II. Project Background

The original [Open Space Protection Plan](#) (OSPP), adopted in 2000, grew out of a 1997 City Council Resolution calling for the creation of "a plan to protect important natural areas and open spaces." Under the direction of the Conservation Board and based on goals identified in the 1996 Burlington Municipal Development Plan, the 2000 Plan focused on: (1) Identifying, protecting and preserving natural areas and open spaces of local, regional, and statewide significance for the benefit of current and future generations; (2) Maintaining and improving the integrity of natural and recreational systems within the City; (3) Guiding development into the city center and neighborhood activity centers; and (4) Ensuring long-term stewardship and appropriate public access to natural areas and open space, including improved opportunities for pedestrian access and interaction throughout the City.

Through 2013 and into 2014, the OSPP was updated to build upon the foundation established by the original Plan. This effort not only focused on the open space inventory, reflecting changes in land use and development, but also depicted open spaces at a much finer scale than in the original inventory. With climate change identified as the 'defining challenge' of our time requiring urgent attention, the Burlington Conservation Board led

an effort in 2021 to create an addendum to the OSPP focused on nature-based climate solutions, which was later adopted in February of 2022.

The current [Urban Forestry Master Plan](#) (UFMP), adopted in 2002, focused on city-owned parklands and street trees. The document provided a comprehensive and multi-objective management plan for the City's urban forest as well as recommendations for the management and care of urban trees and related vegetation on all City-owned land. The 2002 UFMP addressed how the urban forest improves air and water quality, promotes energy efficiency, enhances noise control, improves urban aesthetics, fosters the mental and physical health and well-being of its citizens, and improves wildlife habitats. It also placed a monetary value on the urban forest canopy. However, the UFMP did not evaluate Burlington's urban tree canopy based on equity, propose any policies related to preserving and enhancing the urban forest, nor anticipate the challenges of climate change and loss of trees due to invasive insects.

More city plans that should be consulted can be found in Section III, Task 1. This new Open Space Plan will build on past City plans and establish a policy vision for open space inventory, management, access, and preservation going into the future.

III. Scope of Work and Final Products

This project will be led by a collaborative city team including Parks, Recreation and Waterfront, Permitting and Inspections, and City Planning. It will involve the work of the Conservation Board, Conservation Legacy Program, and the Parks Commission. Ultimately, City Council will consider adopting the plan when it is complete. The Consultant(s) will be working under the direction of City staff throughout the development of the project. The Consultant(s) will also be expected to independently collaborate with other relevant City Departments in order to gather and synthesize relevant information. Mapping and related data analysis will be performed by the University of Vermont's Spatial Analysis Lab. The selected consultant will work collaboratively with city staff and the Spatial Analysis Lab to provide a comprehensive final product.

The Open Space Plan is intended to identify both existing and potential connections between open spaces and the tree canopy, between people and the infrastructure that connects us. To do so, it is anticipated that the process will require:

- Utilizing the Urban Tree Canopy Assessment to be generated by UVM Spatial to evaluate ecosystem services provided by our urban trees and natural areas, and articulate their role in mitigating existing and forthcoming climate challenges that Burlington faces and will face, such as urban heat islands and in providing cooling areas.
- Analyzing data to inform future scenarios related to climate change.
- Identifying any inequities related to open space and tree canopy by neighborhood and propose steps towards narrowing any gaps.
- Building upon the foundation of the existing Urban Forestry Plan, Open Space Protection Plan, Nature Based Climate Solutions Addendum, Municipal Development Plan, and coordinate with the city's Parks, Recreation and Waterfront Comprehensive Plan, and the comprehensive plans for individual parks.

- Ensuring that existing and proposed Open Space goals align with other City plans.
- Establishing metrics for measuring progress throughout the next decade. A successful plan will cast a broader net to not only consider Burlington's forested landscape and traditionally 'green' open spaces in this Plan, but encompass all of the City's natural and urban areas and spaces and surrounding areas.
- Incorporating new goals and objectives as to how Burlingtonians need to manage their natural resources and urban ecosystems to contribute to climate solutions.
- Developing an implementation matrix that outlines actions to be taken to meet the goals of the plan. This matrix should also outline estimated costs, potential funding sources, equipment, and staffing needed to achieve and sustain goals in the long term, including maintenance needs and potential challenges.
- Identifying opportunities to educate residents on the value of trees and natural areas available to them, and potential partners to assist with this effort.
- Providing accessible recommendations for community members to participate in sustaining and strengthening our open spaces through education, volunteerism, and community input.
- Providing guidance for a collaborative approach among city staff, community leaders, local organizations, and citizens that can support our open space initiatives while balancing those with the development needs of a growing city.

The City has also pre-determined that one of the key results of this plan will include an update to the City's Tree Ordinance, which has not ever been revised. Along these lines, if additional policy, zoning, or ordinances need to be modified to support the plan, these should be identified in the implementation matrix.

This Plan will be crucial in the next five years as Burlington begins the process of updating both the Citywide Comprehensive Plan as well as the Parks, Recreation and Waterfront Comprehensive Plan*.

A breakdown of tasks and responsibilities is anticipated to generally include those outlined below. The City may negotiate additional services as needed or as identified the consultant's proposal.

A. Task 1: Analysis of Previous Plans and Studies

The consultant, with assistance from City of Burlington staff, will conduct an analysis of previously completed, pending, and recently adopted plans, studies, and policies to include, but not limited to, the following:

- [Open Space Protection plan \(2000\)](#)
- [Open Space Protection Plan \(2014\)](#)
 - [Nature Based Climate Solutions Addendum \(2022\)](#)
- [Urban Forestry Master Plan \(2002\)](#)
- [planBTV: Comprehensive Plan \(2019\)](#)
- [ECOS Regional Plan - CCRPC \(2018\)](#)
- Individual Park Plans

The analysis should include gaps in past approaches given the climate emergency, and any insights gained based on successes or lack of progress. The analysis should also look at

how past plans have enabled institutional and structural racism to proliferate, while implementation steps will prioritize addressing these harms and prioritizing implementation strategies to address inequalities. The analysis will serve as a starting point for the plan to build upon and for the consultants to consider in determining how to best engage the public (Task 2) and complete a report (Task 3) that is actionable and reflects Burlington's unique context.

Task 1 Anticipated Deliverables:

- Analysis and Summary Presentation: a summary of findings to be presented to the internal project team and relevant City boards/commissions. Summary materials will be accessible in both language and layout, as well as visually engaging.

B. Task 2: Public Engagement and Outreach

The Consultant will work with City to identify the most effective strategies to solicit, collect, and synthesize public comments using a variety of media including but not limited to the establishment of online presence with dedicated webpage, social media, and printed materials. The identified mechanisms should reflect best practices for equitable data collection to ensure that community members from throughout the city are included in the process, what ways in which we will creatively engage members of the public and how information will be shared. The Consultant will be responsible for facilitation and generating any information materials to be distributed/shared ahead of or during any public engagement. Any materials or content created for public education or will use accessible language and be easily translatable.

Anticipated engagement opportunities include:

- Informational meetings with Neighborhood Planning Assemblies, stakeholder groups (including BACA) and the general public.
- Public meetings (in-person and/or remote) with policy-making bodies including the Conservation Board, Parks Commission, Planning Commission, & City Council.
- Engage the community in the process and ask challenging questions about policy and private responsibilities.
- Identify geographies of deficient open space and/or urban canopy and develop dynamic engagement opportunities by 'going where they are' vs discreet, City led 'meetings.'
- Identify existing organizations and activities, particularly in areas of deficient open space/tree canopy, to engage, celebrate, codify, and support their missions.

Task 2 Anticipated Deliverables:

- Outreach Materials - standardized look and feel for the project to be used digitally and in print material and that will be consistent with the final plan.
- Stakeholder Engagement Work Plan, including but not limited to a meeting/event schedule and subsequent agendas and meeting minutes.
- Public Outreach and Comment Work Plan that identifies the best strategies for engaging the public in the outreach process and options for participation.

- Accessible and translatable content and materials for the City to use during public meetings and other outreach activities.
- Public & Stakeholder Engagement Report, which includes comments from public and stakeholders during engagement activities and synthesizes those comments into goals and objectives.

C. **Task 3: Draft and Final Document Production**

- Generate a Final Open Space Plan for Burlington which is visually engaging and easily accessible to all members of the public and that can be used as an education tool.
- The Final Plan should also include a technical report including data and analysis generated by UVM Spatial as an addendum, as well as identification of any policy (standards, ordinances, fees, for example) and financial needs to support the final plan.

Task 3 Anticipated Deliverables:

- Final Open Space Plan and technical report.
- Any raw files, documents, photos, images, data generated as part of the project.

Responsibilities of the City:

- Provide access to all available relevant geographic information, databases, plans, reports, studies and maps;
- Provide assistance and oversight of analysis as necessary; and
- Assist with coordination and execution of public process and outreach. Support dissemination of information and materials to promote process.

IV. RESPONSE FORMAT

Questions concerning this Request for Proposals (RFP) must be made via email to the point of contact above. Responses to all submitted questions will be posted at: <http://www.burlingtonvt.gov/RFP> by the noted date. Any revisions, addendums, and answers to questions received by the question deadline will be sent to consultants that attend the pre-proposal meeting.

Responses to this RFP must not more than 24 pages in length (12 double-sided or 24 single-sided pages), received per the schedule outlined on Page 1 to be considered. Proposals must be submitted electronically as a .pdf.

Applicants will receive a confirmation email once their proposal is received.

Please ensure that the document is easily printable in an 8.5x11 format. Responses must include the following:

- 1) Qualifications Details consisting of:
 - a) Cover letter including statement of understanding and approach to this project;

- b) Proposed Project Team Members: A description of the team composition, areas of expertise, and role of each member and sub-consultant on the team. Clearly indicate the applicant's designated project manager as well as sub-consultants who will be assigned to the work for the length of the project and their respective expertise in such work;
 - c) Specific Project Experience: Descriptions detailing completed, similar, or relevant project experience that the applicant has executed. Links to similar or relevant projects are encouraged;
 - d) List of References: Provide a minimum of three client references for which the applicant has provided similar planning and design services within the last five years. Include the name, telephone number, and email address of the contact person and a description of the role and services provided to that contact; and,
 - e) Exhibit A (provided in this RFP): Signed by a representative of lead consultant attesting that all terms, conditions, and procedures outlined in this RFP are understood and have been followed.
- 2) Technical Proposal consisting of:
- a) A description of the approach to be taken toward completion of the project, an explanation of any variances to the proposed scope of work as outlined in the RFP, and any insights into the project gained as a result of developing the proposal;
 - b) A scope of work that includes steps to be taken, including any products or deliverables;
 - c) A summary of estimated labor hours by task that clearly identifies the project team members and the number of hours performed by each sub-consultant by task;
 - d) A proposed schedule that indicates project milestones, including deliverables, and overall time for completion; and,
 - e) Any other information deemed necessary to address the requests of this RFP.
- 3) Cost Proposal consisting of: composite schedule by task of direct labor hours;
- a) An itemized schedule of all expenses, including both labor and direct expenses. If the use of sub-consultants is proposed, a separate schedule of hours and expenses must be provided for each sub-consultant)

V. CONSULTANT SELECTION

Proposals will be reviewed and evaluated by City staff based on the information provided. Proposals will be rated according to the following criteria (Total of 100 points possible).

1. **Experience & Qualifications:** Qualifications and experience of staff identified to work on this project (including sub-consultants) and the role and time that each member will perform on the project. (15 pts)
2. **Project Understanding & Knowledge of Area:** Demonstrated understanding of the parameters of this project, its limitations and potential. (15 pts)
3. **Ability to Meet Schedule:** Identify strategies to be applied to complete the plan and

- deliverables within the identified timeline. (15 pts)
4. **Ability to Meet Budget/Value:** Outline how the project will be managed as related to proposed and anticipated additional costs. Estimate of resource allocations to each component of the project and availability of qualified staff. (25 pts)
 5. **Depth of Skills:** Depth or relevant technical experience in undertaking this type of project. (10pts)
 6. **Demonstration of Innovative Approaches:** How were similar projects approached, challenges addressed, and objectives achieved? (10 pts)
 7. **Quality, Clarity & Completeness of Submittal Package** (10 pts)

VI. SUBMISSIONS

Proposals and questions shall be submitted via e-mail to:

Scott Gustin, AICP, CFM

Principal Planner

Dept. of Permitting & Inspections

sgustin@burlingtonvt.gov

Additional submission requirements are as follows:

- Responses to this RFP must be received per the schedule outlined on Page 1 to be considered.
- Applicants are solely responsible for ensuring that proposals arrive on time.
- Each applicant **MUST** provide their submittal electronically as a PDF.
- Faxed proposals **WILL NOT** be accepted.
- Late replies **WILL NOT** be considered.

Communications

It is important that all respondents are given clear and consistent information. Therefore, all respondents are required to submit any questions related to this project or RFP process via email. Responses to all submitted questions will be posted with this RFP at the City website at: <http://www.burlingtonvt.gov/RFP>. Questions concerning this RFP must be received via email per the schedule outlined on page 1. Inquiries received after this date will not be considered or answered.

Respondents should not communicate with any City department or employee during the submission process except as described above. In addition, no communications should be initiated by a respondent to any City Official or persons involved in evaluating or considering the statement of qualifications. Communication with any parties for any purpose other than those expressly described herein may cause an individual firm, or team to be disqualified from participating.

Other terms

The City reserves the right to request clarification of information submitted and to request additional information of one or more respondents. All materials submitted in response to this RFP will become the property of the City upon delivery. This solicitation in no way obligates the City of Burlington to award a contract.

It will be necessary for responding parties to comply fully with the terms and conditions outlined in this document if they are to be considered. A letter attesting that the respondent has read, understands, and followed all procedures is a part of this RFP and must be included as part of the final submittal (Exhibit A).

VII. EXHIBITS

- A. Exhibit A: Understanding of RFP Procedures, Terms, and Conditions
- B. Exhibit B: Draft Contract
- C. Exhibit C: Burlington Standard Contract Conditions
- D. Exhibit C-1: Burlington Standard Insurance and Indemnification Conditions
- E. Exhibit D: Burlington Livable Wage Ordinance Certification
- F. Exhibit E: Burlington Outsourcing Ordinance Certification
- G. Exhibit F: Burlington Union Deterrence Ordinance Certification

Bid documents include this main body of the request for proposals and all exhibits.

VIII. CONTRACTING

The consultant must qualify as an independent contractor and, prior to being awarded a contract, must apply for registration with the Vermont Secretary of State's Office to do business in the State of Vermont, if not already so registered. The registration form may be obtained from the Vermont Secretary of State, 128 State Street, Montpelier, VT 05633-1101, PH: 802-828-2363, Toll-free: 800-439-8683; Vermont Relay Service – 711; web site: <https://www.sec.state.vt.us/>. The contract will not be executed until the consultant is registered with the Secretary of State's Office.

Prior to beginning any work, the consultant shall obtain Insurance Coverage in accordance with the Burlington Standard Insurance and Indemnification Conditions (Exhibit C-1 in this RFP). The certificate of insurance coverage shall be documented on forms acceptable to the City.

IX. AGREEMENT REQUIREMENTS

The selected consultant will be required to execute a contract with the City on the terms and conditions required by the City, including but not limited to those in the Burlington Consultant Conditions (Exhibit C and C-1) and the attached Draft Agreement.

X. LIMITATIONS OF LIABILITY

The City assumes no responsibility or liability for the response to this Request for Proposals.

XI. COSTS ASSOCIATED WITH PROPOSAL

Any costs incurred by any person or entity in preparing, submitting, or presenting a proposal are the sole responsibility of that person or entity, including any requests for additional information or interviews. The City will not reimburse any person or entity for any costs incurred prior to the issuance of the contract.

XII. INDEMNIFICATION

Any party responding to this Request for Proposals is acting in an independent capacity and not as an officer or employee of the City. Any party responding to this Request for Proposals will be required to indemnify, defend, and hold harmless the City, its officers, and employees from all liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the responding party's acts and/or omissions in or related to the response.

XIII. REJECTION OF PROPOSALS

The City reserves the right to reject any or all proposals, to negotiate with one or more parties, or to award the contract to the proposal the City deems will meet its best interests, even if that proposal is not the lowest bid. The City reserves the right to re-advertise for additional proposals and to extend the deadline for submission of the proposals. This Request for Proposals in no way obligates the City to award a contract.

XIV. OWNERSHIP OF DOCUMENTS

Any materials submitted to the City in response to this Request for Proposals shall become the property of the City unless another arrangement is made by written agreement between the City and the responding party. The responding party may retain copies of the original documents.

XV. DUTY TO INFORM CITY OF BID DOCUMENT ERRORS

If a bidder knows, suspects, or has reasonable cause to believe, that an error or omission exists in any of the bid documents, including but not limited to unit prices and rate calculations, the bidder shall immediately give the City written notice thereof. Consultants shall not cause or permit any work to be conducted that may related to the error or omission without first receiving written acknowledgment from the City that City representatives understand the possible error or omission and have approved the requested modifications to the bid or contract documents or that the consultant may proceed without any modification being made to the bid or contract documents.

XVI. PUBLIC RECORDS

Any and all records submitted to the City, whether electronic, paper, or otherwise recorded, are subject to the Vermont Public Records Act. The determination of how those records must be handled is solely within the purview of City. All records the responding party considers to be trade secrets, as that term is defined by subsection 317(c)(9) of the Vermont Public Records Act, or that the responding party otherwise seeks to have the City consider as exempt must be identified clearly and specifically at the time of submission. It is not sufficient to merely state generally that a proposal is proprietary, contains a trade secret, or

is otherwise exempt. Particular records, pages, and sections which are believed to be exempt must be specifically identified as such and must be separated from other records with a convincing explanation and rationale sufficient to justify each exemption from release consistent with Section 317 of Title 1 of the Vermont Statutes Annotated.