

Town of Poultney
9 Main Street
Poultney, Vermont 05764

Village of Poultney
PO Box 121
Poultney, Vermont 05764

Request for Proposals for a Poultney Town/Village Merger Feasibility Study

Date Issued: April 10, 2024

Project Purpose:

This project will allow the Town and Village of Poultney to hire a consultant to support the work of a Merger Steering Committee which will study the feasibility of a merger between the two municipalities.

Overview:

Poultney has two municipalities that govern the community - the Town of Poultney and the Village of Poultney. The community has undertaken several planning initiatives and projects in recent years that impact both the Town and Village; the need to understand, assess, and plan for the respective roles and purviews of the municipalities has become evident.

With this project, the Town and Village are acting on a directive from voters to investigate the feasibility of municipal merger. The Town's Selectboard and Village Trustees will form a Merger Steering Committee to undertake the project with the assistance of a qualified consultant. The work plan asks the consultant to guide the Merger Steering Committee through existing conditions analysis, to support public engagement through committee meetings and public presentations, and to create a merger feasibility report that will inform the community's next steps.

The report will include: 1) a review of the finances, administrative functions, departmental operations (non-administrative functions, staffing levels/compensation, equipment/capital materials, and real estate assets of the Town and Village; and 2) a merger cost/benefits analysis that addresses labor and staffing levels between both municipalities, revenues and expenses for Town and Village and resultant impacts to tax rates and services. Through this planning effort, the municipalities intend to lay the groundwork for a future capital planning project that will assist the community to implement recommendations and act on recent planning efforts. Planning documents are available for review on www.poultneyplanning.com.

The intended long-term outcomes are to educate and inform residents of the roles of the municipalities; to ensure the local government has streamlined processes and is operating at its highest efficiency; and to prepare for capital planning and/or planned growth.

Scope of Work, Deliverables and Anticipated Timeline:

Task 1. Kickoff Meeting with Advisory Committee | Consultant

- Meet with Advisory Committee to review work plan, timeline and project goals. A merger Advisory Committee has been developed to guide the RFP process and initial steps for the project. The Advisory Committee will evolve into a working committee known as the 'Merger Steering Committee' with input from the consultant at the Kickoff Meeting.
- *Deliverables: Memo with final work plan, recommendations for Merger Steering Committee, timeline and project goals.*
- *Anticipated June 2024*

Task 2. Merger Steering Committee Meetings | Consultant

- Lead at least 6 meetings to identify requirements for municipal merger; assess available information to prepare financial impact summaries; discuss existing municipal staff roles and functions; assess scenarios for revised services under merger.
- *Deliverables: Facilitate Merger Steering Committee meetings to progress toward Draft and Final report and prepare meeting minutes.*
- *Anticipated: July - Dec 2024*

Task 3. Draft and Final Report | Consultant

- Draft and final merger feasibility report to include summary of municipal budgets, administration, department operations and assets of the Town and Village with a cost/benefits analysis in support of future capital planning projects.
- *Deliverables: Prepare draft and final feasibility report with input from Merger Steering Committee*
- *Anticipated: Dec 2024 – March 2025*

Task 4. Community Presentations | Consultant

- Presentation to community. It is anticipated that the consultant will present the draft and final report in two public meetings jointly held by the Town and Village of Poultney.
- *Deliverables: In collaboration with Merger Steering Committee, organize, promote and facilitate 2 public meetings to present findings of study.*
- *Anticipated: Jan 2025 & March 2025*

Task 5. Project Management | Local Project Management (Town/Village Manager, Community Development Director)

- Assist consultant to identify key stakeholders and local leaders for planning meetings and public outreach. Collect data and information in support of committee work and/or drafting of feasibility report. Attend community meetings and presentations.
- *Ongoing throughout project*

Proposal Contents

Submitted proposals shall be provided in a single PDF document no longer than 10 pages and shall include, at a minimum:

- An overall description of the consultant's approach to the project including any proposed modifications to the Scope of Work.
- A table describing the steps or tasks, associated costs (labor and expenses), supplies and other resources needed, and a time frame to complete the proposed scope of work. The table shall include a schedule of expected timing of Merger Steering Committee meetings and Community Presentations.
- Suggested modifications to the Scope of Work and Deliverables shall identify associated costs and an explanation of the benefit related to the proposed changes to the scope.
- Brief descriptions of any similar projects that have been completed by the consultant.
- Name, address, phone, resume or CV, and email of three (3) references from recently completed projects.

Evaluation Criteria

Proposals will be evaluated and scored as follows, with a maximum score of 50:

- Experience – maximum 20 points. High scores will be awarded to consultants who demonstrate direct and relevant experience with completing similar studies and analyses for municipalities. Demonstrated knowledge and understanding of municipal utilities will also contribute to a higher score.
- Methodology – maximum of 20 points. The Town and Village understand that evaluating the functions and processes of two municipalities will be challenging. We therefore place a high priority on proposals that articulate a clear methodology to determine the impacts of a potential merger. Higher scores will be awarded to proposals that provide a straightforward approach to produce a thorough draft and final merger feasibility report.
- Project Timeline – maximum of 5 points. With two municipalities included in the study, there will be two Boards (Village Trustees and Town Selectboard) involved. It is anticipated that the Merger Steering Committee will meet with the consultant outside of regularly scheduled municipal board meetings. Completion of the study in an expedient manner and commitment to effectively guiding Steering Committee work is a project goal.

- Cost – maximum of 5 points. Consultants shall identify costs and labor hours associated with each task in the Scope of Work. Any proposed modifications from the Scope of Work shall be identified with costs and labor hours included.

Questions Due: April 26, 2024

Answers Available: May 3, 2024

Proposal Submittal Procedure and Deadline

Please submit your proposal according to the following procedures:

- 1) In a single PDF document no longer than 10 pages
- 2) Via email to poultneymanager@comcast.net
- 3) No later than 4:00 PM **on May 10, 2024**
- 4) Proposals will be opened and reviewed **on May 13, 2024**
- 5) Evaluations and scoring will be completed promptly, and the winning bid will be informed.

The Town of Poultney reserves the right to select any proposal and to cancel the project at any time before contract execution.

Available Funding: \$11,530.00

Project Contact:

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