



## CITY COUNCIL STAFF REPORT

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**TO:** Honorable Mayor and City Council **DATE:** November 4, 2019

**FROM:** Matthew Bronson, City Manager

**PREPARED BY:** Bruce Buckingham, Community Development Director  
Janet Reese, Associate Planner

**SUBJECT:** Professional Services Agreement for a Senior Center Feasibility Study

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### **RECOMMENDATION**

Approve a Professional Services Agreement with GreenPlay, LLC for preparation of a senior center feasibility study and authorize the City Manager to execute this agreement on behalf of the City.

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### **BACKGROUND**

In September 2017, the State Department of Housing and Community Development (HCD) released a Notice of Funding Availability for the Community Block Grant (CDBG) Program. In November 2017, the Council provided direction to submit an application and in July 2018, the City was notified that the CDBG application was funded as follows:

<b>Activity Title</b>	<b>Description</b>	<b>Award</b>
Water/Sewer Improvements	Water line improvements	\$1,686,495
Activity Delivery – Water line improvements		\$134,920
Public Service	Subsistence Payments	\$381,395
Public Service	Security Deposits	\$83,721
Planning Only	Senior Center Feasibility	\$93,023
General Program Administration		\$178,467
<b>Total</b>		<b>\$2,558,021</b>

In August 2019, staff prepared and circulated a Request for Proposals (RFP) requesting proposals to prepare a senior center feasibility study. The City received three proposals from 4 Creeks (San Luis Obispo, CA), GreenPlay LLC (Louisville, CO), and Integrated Consulting Group (Chino Hills, CA). Staff reviewed the proposals and is recommending that the Council authorize the award of the contract to GreenPlay, LLC which demonstrated relevant knowledge and experience in the preparation of similar feasibility studies. Headquartered in Colorado with a number of regional offices, including Oakland and Stockton, they have worked with a number of jurisdictions in California, including the City of Ventura and the County of San Luis Obispo.

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Therefore, staff is recommending that the City Council award GreenPlay, LLC a contract for an amount not to exceed \$98,023 and authorize the City Manager to execute an agreement on behalf of the City. A draft of the study will be presented to the Council for review in spring 2020.

### **FISCAL IMPACT**

The total amount allocated by the CDBG grant is \$93,023. The grant requires a \$5,000 cash match by the City, which was included in the FY 2019-20 budget. Therefore, the total funding available for this study is \$98,023.

### **ALTERNATIVES**

The City Council has the following alternatives to consider:

1. Adopt the Resolution authorizing the City to enter into a Professional Services Agreement with GreenPlay, LLC; or
2. Provide alternative direction to staff.

### **PUBLIC NOTIFICATION**

The agenda was posted in accordance with the Brown Act.

### **ATTACHMENTS**

1. GreenPlay, LLC Scope of Services, Schedule, and Budget

## GROVER BEACH, CA – SCOPE, SCHEDULE AND BUDGET

### PROJECT UNDERSTANDING

We understand that the City of Grover Beach is interested in conducting a Needs Assessment and Feasibility Study for a Senior Recreation Facility. We recognize that the City is located on the Central Coast of California in San Luis Obispo County. We know that in 2010, the population of people 65+ in your City was about 11 percent. However, data from the surrounding area will also be considered.

From our recent work on the County of San Luis Obispo Parks and Recreation Needs Assessment, we know that 34% of the population in the County are Baby Boomers or older, and there is a strong needs for additional senior programming in the County.

The purpose of this study is to determine programming and services that could be offered at the senior recreation facility, and to evaluate potential sites for the new facility. We understand that this study may be used by the City to determine future costs and/or apply for Community Development Block Grant (CDBG) funding.

### SCOPE OF WORK

Our process has proven successful on projects of similar elements and size. We are familiar with multiple aspects of operations and management of similar facilities. We will provide an informed and objective analysis of the City's current market conditions, unmet needs, and competitive senior programs and facilities, and will use this information to develop a document that will ensure the best possible provision of services in the most cost effective manner.

#### Strategic Kick-Off (SKO) and Determination of Critical Success Factors

Upon selection and award, our GreenPlay team will provide a **Detailed Work Plan** to the Project Team within 10 days for discussion at a Strategic Kick-Off meeting.

#### Project Coordination

Having worked as professionals on "your side of the table," we understand how important it is for consultants to be accessible without interfering with your daily responsibilities. We will work closely with your team during Start-Up to identify key "**Critical Success Factors**" that will help ensure that this project is successful and achieves your desired level of involvement and outcomes.

We will review the details of the work plan at this meeting, and will formalize the timeline and details of the Project Planning Process including:

- Accepted methodologies and task processes
- Detailed project schedule and meetings
- Final methodology
- Expected quality and formats for deliverables
- Agreement on implementation strategies
- Identification and agreement on project "Critical Success Factors"

### **Integration with Existing Planning Documents**

As part of the information gathering phase, we will integrate relevant previous and/or current planning work including the General Plan, the recent Needs Assessment for Parks and Recreation we completed for the County of San Luis Obispo, individual park master plans as applicable, and from existing funding plans, budgets, and work plans into this Feasibility Study.

We will help the City to determine operational and maintenance costs, pricing and revenue opportunities, and staffing and operating structure for management of the senior recreation center. We will also evaluate existing information with regard to the political sensitivities and direction regarding provision of services for the community.

### **Task 1 - Existing Conditions Report**

#### **Activity Profile/Competitive Facilities**

Data will be assembled, evaluated, and presented on existing public and private senior recreation facilities in the Five Cities area. We will evaluate levels of use, marketing and promotion efforts, and technical capabilities.

Data will include, at a minimum:

- Description of facilities
- Current use/activities
- Current attendance/marketing efforts
- Political, structural, and organizational factors
- Operating costs and management and operational structures
- Economic impact on region and financial performance

We will examine and review the current services, participation levels, operation and structure, and identify opportunities for improvements and future needs. This research includes types of amenities, fee structures, and any other operating data available. We will review, analyze, and report on the findings to help inform more accurate operations. We will utilize our information from relevant plans, and we will also reach out to alternative providers in the area.

#### **Market Analysis – Gaps, Collaborations, and Saturations**

We recognize that background data and current usage cannot alone tell the full story of the needs or opportunities. For this study, GreenPlay will utilize our nation-wide parks and recreation experience to analyze and summarize potential market influences to identify gaps and collaborative opportunities for the City of Grover Beach for short-term recommendations and long-term goals.

#### **Demographics and Population Projections**

We will identify the constituency of the City and the Five Cities area through a demographic analysis and market profile, utilizing all information available from previous planning efforts and gathered from the City, the U.S. Census Bureau, Esri sources, and other national and local sources, including our recent work with San Luis Obispo County. We will work directly with your leadership to help document growth and redevelopment areas and land use changes. A detailed demographic analysis based on service areas will outline trends and information that could affect the need for a senior recreation facility.

## **SWOT Analysis**

To develop short and long-term strategies for the future planning of the facility and the provision of programs and services provided by the senior recreation center, we will conduct a **SWOT Analysis** of the proposed facility. A SWOT Analysis is an effective and realistic way of identifying the market **Strengths** and internal and external **Weaknesses**, and of examining the **Opportunities** and **Threats** faced by the organization in the provision of senior recreation.

## **Trends Analysis**

Strategic trends analysis will consider demographic shifts and their impact on future senior recreation provisions. This analysis will also identify interest and participation levels for a variety of activities, will assess how services are provided through both administrative and planning trends, and will evaluate national and regional trends. This process includes strategic analysis of local, state, and national best practices and what is new in the field of senior recreation.

## **Task 2 - Community Input Process**

After collecting background information, we will schedule several opportunities for information gathering, conducting top-level staff interviews, administration and leadership interviews, and meeting with the defined stakeholders, as determined during Strategic Kick-Off.

*Note, we are not proposing a full statistically-valid survey of the community at this time. However, if you have not completed one on this topic in the last three years, we may suggest adding one (fee and scope to be determined). It is the most reliable method available to determine the opinions and needs of non-users (who may be asked to help pay for the senior recreation center).*

## **Staff and Stakeholder Engagement and Involvement**

We will conduct individual employee interviews and several focus group meetings to solicit input on the proposed senior recreation center choosing participants from the public, City Staff, Parks, Recreation, and Beautification Board members, and City Council members. An in-depth staff engagement process that includes all of the agency's staff members can be conducted as part of the analysis. Information gathered from employees will be treated sensitively and considered confidential. Other data collection methods will also be used to supplement this project task.

## **Citizen Involvement**

Individual users, user groups, special interest organizations, associations, and other stakeholders will be given ample opportunity to participate in the feasibility study. Our team will explore knowledge of local issues and concerns that will assist us in producing useful and pertinent community feedback.

GreenPlay staff members are experienced and skilled facilitators, and we draw from a variety of methodologies that are designed to encourage and structure feedback for clearly identified and measurable outcomes.

A suggested approach is provided; however, the final methodology will be detailed with you during SKO. Based on previous successes, the following citizen involvement strategy approach is designed to assure residents, user groups, associations, neighboring communities, and other stakeholders that they are provided an opportunity to participate in the plan's development, and is recommended for this project:

- **Initial Information Gathering:** Collect information on awareness, use patterns, satisfaction, desires, barriers, vision, priorities, funding possibilities, and willingness to pay, so as to inform the development of the study.
- Two (2) **focus group meetings** drawing from special interest individuals and groups, other service providers (staff, schools, health clubs, seniors, etc.), open to the public at large. This method ensures a nucleus of participants with vested interest while also encouraging others to participate.
- **Community-wide public meetings (1)** to provide information and to validate and round out the qualitative information received from the focus groups.
- **Stakeholder interviews** with those who can contribute specific information in a more detailed manner (might include representatives from neighboring communities, sister agencies, other departments of the City, Parks, Recreation, and Beautification Board members, etc.).
- **Findings and Draft Presentations** to present a summary of findings from the inventory, needs assessment, and initial analysis for validation by staff, the City project team, decision makers, stakeholders, and the public, including a **Community-wide public meeting (2)**, and a **City Council presentation**
- **Draft Recommendations Presentation**
- **Final Presentation for Adoption**

#### **Online Community Survey**

We will conduct an online community survey of residents to garner feedback for the feasibility of a senior recreation center. Questions will be drafted based on information gathered and approved by the City prior to distribution. We will distribute the survey using an online tool such as Survey Monkey and send it to a pre-determined list of residents provided by the City. We suggest that the City promote the survey through your website, social media, etc.

## **LEVERAGING IMPACT FROM THE FEASIBILITY STUDY THROUGH COMMUNICATION AND SOCIAL MEDIA**

Leveraging support and participation for the Needs Assessment and Feasibility Study means that we must communicate the importance of the process to your residents in a variety of methods. It starts with properly and appropriately marketing the value of the planning process to residents, and then communicating how the community can and should play a crucial role in creating a vision for the future. To ensure successful public meeting outreach, we will collaborate with the City's marketing lead to devise a communications strategy that makes sense for your particular project. GreenPlay can assist with suggested content for in-house staff activation, or for an additional fee, we can assign experienced staff to host, create, and disseminate content to promote engagement for your agency throughout the project.

If additional social media engagement is desired, our team will prepare at least one online public inquiry to engage participants on the City's most successful social media platform. In addition, the team will prepare and provide pieces of released content for distribution on popular social media accounts. The content will promote the planning process and showcase the key findings, which will be shared on the City's social media account once approved. Our extensive list of creative engagement strategies, combined with online marketing tactics, will equip agencies with a toolbelt of resources to ensure that attendance reaches as many people as desired.

### **EXAMPLES OF POTENTIAL ENGAGEMENT STRATEGIES**

#### **Website and Social Media Strategies**

- Do you have funding to enhance the strategies and web presence?
- How much control of website and social media (permissions) do you have?
- Would you like to add a project page on website or a separate site?
- Release a schedule of important dates
- Create a feed of photos, tweets, etc.
- Do you want to add popup/banners?
- Sharing links to pages on all flyers, social outlets
- Enhanced email strategies for social media

#### **Examples of Postings for Facebook, Twitter, and Instagram**

- Creating events, celebrations, and milestones
- Hosting live Q&A discussions
- Scheduling live videos, photos, polls, stories, etc.

### Task 3 - Draft Senior Center Site Feasibility Report

Using the results of the community input process and the existing conditions analysis, we will develop a resource map with identification of **up to six potential locations** for the new senior recreation facility. A site matrix will be developed that identifies programming recommendations, required space needs, and other site development criteria. Each site will be weighted based on its potential for filling community needs.

#### Site Analysis and Ranking

The matrix will identify the pros and cons of the site and an evaluation of how the site will affect the construction cost estimates and business plan.

The sites will be scored and ranked on criteria including (but not limited to) size, location to residents, accessibility, marketability, topography, access to utilities, site costs, environmental contaminants, current zoning, adjacent properties, and ability to expand facilities.

We will review preliminary programming options for the senior recreation facility with the City's project team.

### Task 4 - Presentation to the City Council

We will prepare a presentation detailing the results of Tasks 1-3 and will present the findings to the City Council. The presentation will include identification of the top **two** potential sites for the facility.

#### Findings and Visioning

GreenPlay team consultants will compile findings from Tasks A-E and will prepare a summary of **Findings Presentation** for staff and decision makers in order to validate the accuracy of the findings. During this stage, we will confirm that all information identified and collected thus far is correct and ask all stakeholders to share any additional issues or opportunities for consideration as we prepare to move forward into analysis and recommendations.

Following our review of the Findings, we will facilitate a **Visioning Strategies Workshop** that will analyze all findings, including operational feasibility, political or historical constraints, and any other potential challenges. We will also identify opportunities for implementation steps, work plans, and funding implications.

This Workshop will help provide an articulated guiding vision for the senior recreation facility and other site amenities, goals, desired outcomes, and standards identified to direct policy and management structure.

### Task 5 - Development of Conceptual Plans

#### Facility Concepts (Interior/Exterior)

Our team will utilize information from the previous tasks, along with input from the staff and the project team to verify that the proposed program elements for the center are appropriate. Design concepts will be created for **two** preferred sites for the senior recreation facility.



The design process is as follows:

- Participatory activities to generate project input, including:
  - Presentation of potential senior recreation centers to provide a visual picture of potential programming components
  - Identification of potential costs of programming components
  - Activities that will assist in building consensus and determining program components and space allocation requirements that will best meet community needs
  - Priorities and phasing options
- Site discussion and preliminary analysis
  - Site Size versus Program
  - Facility Expansion Potential
  - Potential Program Elements
  - Access to Site
  - Compatibility with Neighboring Uses
  - Land and Utility Infrastructure Costs
  - Site Character and Context
  - Other Site Amenities/Intangibles

### **Exterior Components**

We will provide conceptual design and narrative on the outdoor elements, and major exterior elements of the senior recreation center including:

- Parking lots
- Drop-off/pick-up spots
- Sidewalks/trails
- Courtyards
- Landscape design that includes green space and natural areas

### **Financial Assessment and Modeling**

We will develop a detailed financial model of the operating revenues and expenses of facilities and programming associated with the senior recreation facility on market research results and the recommended rate models. A financial assessment will be created for the **two** conceptual site plan options.

Once the recommendations for future usage are determined, we will conduct an analysis of existing and potential marketing, budgets, financial resources, cost recovery, pricing methodology, and user fees for any recommended services and facilities.

We may suggest a focus on potential revenue generation to help cover operational and maintenance costs. We have effective methods for working with project representatives to determine which types of revenue generation will be most appropriate for operations of each option.

From this information, we will create a conceptual operating and maintenance budget and a financial pro-forma to detail the projected expenses, revenues, and cost recovery each year and for the next several years.

## **The Pyramid Methodology**

### *An Important Foundation*

GreenPlay utilizes and has improved the “**Pyramid**” methodology for helping agencies create an overall philosophy and approach for resource allocation, program pricing, and cost recovery evaluation. We are currently training agencies (and presenting this information at conferences) in the implementation and use of this straightforward but innovative methodology which is invaluable for making tough resource allocation decisions, and creating pricing and cost recovery strategies.

We will explain these concepts to the City’s Project Team to help create buy-in and consensus for future strategies for funding, fees, and resource allocation for facilities and programs that are or may be provided at the senior recreation center. This methodology will be helpful for evaluating the financial sustainability of the facility from a long-term operational perspective.

## **Annual Operational Budget Projections**

Based on all of the information gathered and provided, GreenPlay will develop annual operational and maintenance budget projections for each of the **two** conceptual site plans to include all expenses and revenues associated with the facility. The projected operational and maintenance budgets will include (but will not be limited to) staffing levels, benefits, commodities, contractual services, and utilities taking into account hours of operation, and other key operating assumptions.

Revenue opportunities may include pricing strategies, rentals, concessions, registration fees, program fees, merchandising, events, partnerships, sponsorships, cost recovery, and desired subsidy levels. Fee structures will be based on the identified fees from daily use, rentals, and other factors determined during the comparative analysis. Revenue is estimated taking recommended fee schedules into account.

## **Projected Pro-Forma**

GreenPlay will create a five-year pro-forma projecting the expenses, revenues, and cost recovery anticipated over the next five years of operating the facility for each option. The pro-forma will be based on the operational budget projections as well as all the information provided by the agency. These figures will project increases in participation as well as estimated inflationary costs and/or price changes.

## **Operations Assessment**

The GreenPlay Team will assess the general organizational performance for each conceptual plan of the senior recreation facility to look for potential efficiencies, including an analysis of current policies, procedures, processes, and business planning efforts already conducted by the City. We will also analyze available previous planning efforts, historical perspective of parks and recreation facilities in the community, customer satisfaction, retention, and other performance indicators.

## Task 6 - Final Presentation

### Recommendations, Implementation Strategies, and Draft Plan

After validating the Findings and conducting the Visioning Strategies Development Workshop, our team will work to draft an easily understandable feasibility study report with conclusions determined for each of the three sites. Draft Feasibility Study Presentations will be presented at a second public meeting with the public and the City Council. Revisions, additional input, and recommendations will be incorporated into your final report.

- **A Draft Feasibility Study** will be submitted for preliminary review, and all comments will be incorporated into your Final study. After the review, we will assist in guiding the study through any desired formal adoption process, including a meeting to present the draft Plan and/or for adoption of the final study.
- **For the Draft Feasibility Study** we will provide the City with one (1) printed and bound color copy and one (1) electronic copy in a format compatible with existing software and for posting on City website.
- **For the Final Product** we will provide the City with one (1) printed and bound color copy and an electronic copy in a format compatible with existing software and for posting on your website.

<b>SCHEDULE - Start November 2019</b>	<b>N</b>	<b>D</b>	<b>J</b>	<b>F</b>	<b>M</b>	<b>A</b>	<b>M</b>
<b>Strategic Kick-Off (SKO) and Determination of Critical Success Factors</b>							
Project Coordination	SKO						
<b>Task 1 - Existing Conditions Report</b>							
Activity Profile/Competitive Facilities			SCM		SCM		
Market Analysis			SCM		SCM		
<b>Task 2 - Community Input Process</b>							
Focus Group Meetings			SCM		SCM		
Community-wide public meetings			PM #1		PM #2		
Stakeholder interviews			SCM		SCM		
Online Community Survey			SCM		SCM		
<b>Task 3 - Draft Senior Center Site Feasibility Report</b>							
Site Analysis and Ranking					SCM		
Draft Report					SCM		
<b>Task 4 - Presentation to the City Council</b>							
Findings and Visioning					Findings		
<b>Task 5 - Development of Conceptual Plans</b>							
Facility Concepts (Interior/Exterior)					SCM		
Financial Assessment and Modeling					SCM		
Annual Operational Budget Projections					SCM		
Operations Assessment					SCM		
<b>Task 6 - Final Presentation</b>							
Final Report						Draft	Final

## Proposed Budget

<b>Budget</b>				
<b>Grover Beach CA Senior Center Study</b>				
<b>TASKS</b>	<b>GreenPlay</b>	<b>KTUA</b>	<b>BRS</b>	<b>Total</b>
Strategic Kick-Off (SKO) and Determination of Critical Success	\$ 3,675	\$ 500	\$ 500	\$ 4,675
Task 1 - Existing Conditions Report	\$ 5,250	\$ 6,000	\$ 2,000	\$ 13,250
Task 2 - Community Input Process	\$ 11,025			\$ 11,025
Online Community Survey	\$ 5,775			\$ 5,775
Task 3 - Draft Senior Center Site Feasibility Report	\$ 3,225	\$ 4,000	\$ 1,000	\$ 8,225
Task 4 - Presentation to the City Council	\$ 3,600			\$ 3,600
Task 5 - Development of Conceptual Plans				
Facility Concepts (Interior/Exterior)	\$ 2,100	\$ 5,000	\$ 8,000	\$ 15,100
Financial Assessment and Modeling	\$ 10,500	\$ 1,000	\$ 5,000	\$ 16,500
Annual Operational Budget Projections	\$ 5,250			\$ 5,250
Operations Assessment	\$ 3,675			\$ 3,675
Task 6 - Final Presentation	\$ 7,948		\$ 3,000	\$ 10,948
<b>Totals</b>	<b>\$ 62,023</b>	<b>\$ 16,500</b>	<b>\$ 19,500</b>	<b>\$ 98,023</b>

*This project is billed as Firm-Fixed Fee, meaning that all travel, reimbursables, and deliverables are built into the per task cost.*

### Fee Basis

**GreenPlay does not bill on an hourly basis.** We have established an inclusive fee schedule that covers the salaries of our professional project staff and of support staff who enable them to function effectively and efficiently. We consider the prevailing rates in our industry and the level of specialized expertise that we provide.

For projects which require more than 100 hours of work, GreenPlay proposes using a **Firm-Fixed Price** model for compensation. This means that the contract is based on a projected number of hours, but the compensation is actually based on the completion of pre-determined contracted tasks identified in the Scope of Work and within a pre-specified timeline.

This typically works well for the client, ensuring that all work is accomplished regardless of the time required to complete each task. In the event that the contracted **Scope of Work** is changed by the client during the project, GreenPlay can adjust total contract fees accordingly based on our regular hourly rates. This project is proposed as a Firm-Fixed Fee project; therefore, individual hourly rates and projected number of hours are not applicable.

### Our rates include:

- All deliverables as outlined in the Scope of Work.
- Professional staff, sub-consultant, and administrative salaries.
- All office overhead, equipment, utilities, and consulting insurances.
- Taxes, employee benefits, and Worker's Compensation.
- Administrative support staff and supplies, and local travel.

- Work Products and meetings as outlined in the Scope of Work.
- All travel costs are built into the firm-fixed fee.

**Additional Services: If Requested**

GreenPlay's rate for additional services is based on an average of \$150 per hour if not proposed as "firm-fixed fee." For sub-consultants, hourly rates range from \$60 to \$150 per hour, depending on the task. As this project is based on a firm-fixed fee, our consultants will dedicate the necessary time to complete the project. Our sub-consultant team members set their hourly rates according to their individual firm fee schedules. While the hourly rates may sound high, when considering the costs for implementing additional experienced and professional full-time staff, benefits, insurances, office space, computers and equipment, support staff, utilities, etc., we find that this rate is usually comparable to or lower than what an agency would spend for in-house staff. An additional benefit is that when the project is finished, the expense ends. GreenPlay typically submits an invoice for payment to the project manager/primary contact person on a monthly basis. Each invoice includes a brief description of the services provided and percentage of Scope completed to date. Invoices past due over 60 days will accrue 1.5% interest per month. Other structures for compensation and payment can be negotiable prior to contract award.

**Project Delay Fee**

GreenPlay will work with your project team to jointly lay out an achievable schedule during contracting and detailed during the SKO. There is a cost to GreenPlay if the project is delayed beyond the accepted contracted schedule end date, so we will work diligently with you to achieve it. We expect prompt responses and to keep milestones for approval points. If the project is delayed due to County requests or non-response, we may request additional fees to do so. Typically, this fee is around 10% of remaining budget for each month of client caused delays. We are happy to help keep this project on schedule, and value open and transparent conversations about how to best do so throughout the project.