

## COMPREHENSIVE RECREATION, PARK, AND OPEN SPACE PLAN Guidelines and Example Scope of Work

The following information is provided to assist in the development of a scope of work (SOW) for a Comprehensive Recreation, Park, and Open Space Plan (CRPOS) that accurately addresses community needs and specific project requirements under the Community Conservation Partnerships Program. This SOW can also be used to acquire a cost estimate from a qualified consultant.

Before starting a grant application, contact the appropriate Bureau Regional Advisor to discuss the project and assist in the development of a general SOW. Contact information is available on the [Regional Staff Assignment map](#). Please contact the advisor assigned to the region in which your project is located.

### **Comprehensive Recreation, Park, and Open Space Plan (CRPOS)**

A CRPOS Plan is a plan for the future. It involves a research, public input, and analysis process that leads to a municipal, county or regional-based plan that identifies the methods, resources, organizational capacity, and capital investment needed to accomplish both short-term and long-term recreation and conservation goals of the community. Greenways may also be studied as part of the CRPOS Plan. Greenways are linear corridors of public and private land that serve as the linkages between specifically identified natural resource-based or manmade features and can serve a variety of functions. The planning process includes substantial citizen involvement, inventory of existing conditions and facilities, analysis of issues and community needs, and specific recommendations that set forth actions, priorities, and cost. It also includes an implementation plan and strategy for measuring and evaluating progress.

A CRPOS Plan is an official document that, in part, dictates municipal land use policy and decisions. The Bureau strongly encourages municipalities to follow adoption procedures listed in the Pennsylvania Municipalities Planning Code (Section 302).

### **Scope of Work (SOW)**

The SOW describes specific work elements and tasks to be completed by the consultant, including deliverables and timeline. Potential consultants use the detailed SOW to develop a competitive proposal.

### **Consultant Selection**

Professional design consultants must be selected using a competitive Request for Proposals (RFP) process. If a project is selected for grant funding, a detailed SOW must be submitted to the Bureau Project Manager for review and approval before issuing the RFP or awarding a contract for professional services. The DCNR-approved RFP must be sent to at least five (5) consulting firms. The RFP provides a detailed SOW and related requirements so that all firms are competing with the same information. Proposals from more than one consulting firm provide an opportunity to compare different approaches to the work, various cost proposals and the level of expertise of more than one firm. The firm selected through an RFP process does not have to be the one submitting the lowest cost proposal. The selected proposal must be cost-effective and responsive to the community and project needs.

## Comprehensive Recreation, Park, and Open Space Plan (CRPOS) Example Scope of Work (SOW)

CRPOS Plans funded by the Bureau generally incorporate the work elements outlined in the following Example SOW. Depending on agency objectives and community recreation and conservation needs, the scope of work may be modified by adding or subtracting work elements. In preparation for the RFP process, the work elements and tasks must be further defined to fully develop the project SOW. The Bureau Project Manager will assist the Grantee in finalizing a SOW that best meets the needs of the community, established planning standards, and grant program requirements.

### **A. PLAN PURPOSE, GOALS, AND OBJECTIVES**

Describe the purpose of the plan including any special or unique community concerns that will be addressed. Develop goals that describe what the plan will accomplish. Discuss how the agency and the public will use the plan. The purpose, goals, and objectives should be developed prior to consultant selection. This will allow the consultant team to concentrate the research and analysis on the highest agency priorities.

### **B. PUBLIC PARTICIPATION**

Public participation is required throughout the planning process to help determine and prioritize community needs. Public participation techniques are outlined in the Bureau's *Public Participation Guide* and below. Community involvement and engagement must prioritize diversity, equity, and inclusion to ensure feedback and recommendations that are comprehensive, appropriate, and accountable. The narrative must include a detailed summary of the public participation methods, results, and conclusions (i.e. areas of consensus and/or contention); raw data should be included in the appendix.

1. At minimum, public participation must include:
  - a. Study Committee (5-9 people) – A representative and diverse study committee must be formed and meet with the planning consultant on a regular basis to provide guidance and review of the work. Consider appointing 5-9 people to the committee.
  - b. Public Meetings (2 meetings) – At least two public meetings must be held and at least one must be with elected officials. The appropriate number and type of meetings will vary depending on the project scope and community needs.
  - c. Key Person Interviews (10-20 interviews) – A key person interview is a one-on-one discussion about a specific topic with an individual recognized or designated as a community leader. The Study Committee should help to determine potential interviewees. Consider conducting 10-20 interviews.
  
2. Additional recommended public participation:
  - a. Citizen Survey – A random sample citizen survey is a type of opinion poll that asks residents for their perspectives on specific topics. Describe the survey method to be used (i.e. written, telephone, internet, etc.) and the anticipated number of survey questionnaires.
  - b. Focus Group – A focus group provides community input from individuals with common interests. Consider focus groups comprised of neighborhood residents, elected officials, organized sports organizations, etc.
  - c. Planning Document Review – Review previous planning documents and consider the results of recent public participation efforts regarding parks, recreation, and open space.

### **C. BACKGROUND INFORMATION**

The background information provides an overview of the community and the recreation, park, and open space system. Analyzing this data helps develop a future system that reflects the needs of present and future residents as well as conserves the natural, cultural, and historic elements that contribute to the uniqueness and cohesiveness of the community. Provide the following information:

1. Community Background
  - a. Geographic location, size, regional context, character, history, etc.
  - b. Type of government.
  - c. History of the agency's recreation and park functions.
2. Socioeconomics (use of U.S. Census data is required)
  - a. Demographic trends including population, age, gender, race & ethnicity, households, income, education, and visitors.
  - b. Population projections for at least the next 10-20 years.
  - c. Economic trends including economic conditions, major employers, and fiscal health.
3. Physical Characteristics
  - a. Updated version of the existing municipal land use map.
  - b. Inventory and discussion of natural features and ecosystems such as forests, wetlands, waterways, farmland, critical habitats, etc.
  - c. Inventory and discussion of cultural and man-made features such as historic sites, transportation corridors, housing, utilities, etc.
  - d. Inventory and analysis of environmental issues such as stormwater and brownfields.
4. Provisions of existing planning documents (i.e. Comprehensive Land Use Plan, Watershed or Rivers Conservation Plan, Greenway Plan, [2020-2024 Pennsylvania Statewide Comprehensive Outdoor Recreation Plan](#), etc.).

### **D. AGENCY MISSION STATEMENT, GOALS, AND OBJECTIVES**

The agency mission statement provides a clear definition of the agency's purpose and responsibilities. Goals address what the agency hopes to achieve in the next ten years. Agencies that have already developed a mission statement and goals should analyze them to determine if they clearly focus the agency's direction and purpose, are reasonable and achievable, and reflect the needs of their constituents. For agencies initiating a parks, recreation, and open space program, completion of this task may be best accomplished at the end of the project.

1. Discuss the purpose and use of a mission statement, goals, and objectives. They should have long-term applicability beyond the planning process.
2. Develop a draft mission statement, goals, and objectives. They should be re-evaluated at the end of the planning process to ensure that they are still appropriate for the agency.

### **E. AGENCY ADMINISTRATION**

Analyze how effectively the agency administers recreation, park, and open space services. Agency practices are compared to accepted administrative practices. Agency practices include the ability to involve the public with long-range planning efforts; the ability to work cooperatively with other public agencies, community groups, and businesses; and the effectiveness of existing office procedures and policies.

Describe and analyze the following:

1. Enabling legal document from which the agency receives authority and responsibility.
2. Relationships between the agency and community organizations and agency involvement with regional initiatives.
3. Public relations and marketing efforts to promote agency functions, services, and programs.
4. Cooperative efforts and established agreements between the agency and other municipalities, schools, recreation providers, conservation groups, support groups, area businesses, etc.
5. Policies and procedures that govern the general operation of the agency recreation, park, and open space functions (use of facilities, non-resident participation, policy manuals, risk management program, record keeping, etc.).
6. Opportunities for public involvement in planning efforts including use of program evaluation forms, distribution of surveys, public meetings, etc.
7. Record-keeping procedures.
8. Administrative challenges.

#### **F. AGENCY PERSONNEL**

Describes who is responsible for providing the agency recreation, park, and open space programs and services and analyze the effectiveness of each involved entity. For most agencies, at least one entity is responsible for developing programs and services. Agency personnel may include the governing body, municipal manager; public works department; paid recreation and park staff, maintenance staff, program staff, and/or volunteers such as recreation and park board members.

1. Analyze the organizational chart for accuracy with current conditions and procedures.
2. Describe and analyze the following:
  - a. Number, type, roles, and responsibilities of agency personnel currently responsible for providing recreation, park, and open space programs and services.
  - b. Number, type, roles, and responsibilities of volunteers, such as the recreation and park board or arts council, that are responsible for maintaining recreation, park, and open space and assisting with programs, services, etc.
  - c. How new staff/volunteers are hired/appointed and trained for new positions.
  - d. Existing personnel policies including manuals, appraisal systems, continuing education, etc.
  - e. Staffing level (paid or volunteer) needed to effectively administer and maintain the agency facilities, programs, and services. Compare with existing conditions.

#### **G. FACILITIES AND OPEN SPACE INVENTORY AND ANALYSIS**

Analyze existing recreation, park, and open space resources, regardless of ownership, and compare to standards based on population and service areas. The general locations and types

of new recreation, park, and open space facilities and development priorities are identified with strong public participation and input.

1. On a map broken down by census tract or neighborhood, identify the location of indoor and outdoor facilities and open space owned/operated by:
  - a. Public agencies
  - b. Schools (public and private, all levels)
  - c. Major non-profits and quasi-public organizations (athletic associations, scouts, conservancies, service clubs, YMCA/YWCA's, etc.)
  - d. Major private businesses (health clubs, bowling alleys, etc.)
2. Provide the following information in chart form for the indoor and outdoor facilities and open space identified on the map:
  - a. Facility or open space name
  - b. Ownership
  - c. Number and type of facilities
  - d. Acreage
  - e. General condition and use
3. Provide the following information for the indoor and outdoor facilities and open space owned or managed by the agency:
  - a. Condition and required upgrades and/or major repairs.
  - b. Obsolete, underutilized, and/or inappropriate.
  - c. Compliance with current safety guidelines such as those developed by the Consumer Product Safety Commission (Playgrounds).
  - d. Compliance with accessibility standards (Americans with Disabilities Act).
  - e. Compliance with inclusive design standards.
  - f. Connectivity to transportation network (walk, bike, vehicle, public transit, etc.).
4. Determine local access to outdoor recreation using the following resources:
  - a. The National Recreation and Park Association (NRPA) [Park Metrics](#) is a comprehensive source of data benchmarks and insights for the effective management and planning of operating resources and capital facilities.
  - b. The Trust for Public Land (TPL) [ParkServe](#) interactive platform tracks park access in urban areas. The web-based tool identifies local parks and open space, determines the percentage of residents who live within a 10-minute walk, and identifies the neighborhoods most in need of new parks.
  - c. DCNR Partnered with the Trust for Public Land (TPL) and WeConservePA to use Geographic Information Systems (GIS) to understand access to outdoor recreation in Pennsylvania. TPL's Research and Innovation Team used the data analysis methods to assist DCNR in identifying [areas with the greatest need and opportunity](#). This [interactive map of outdoor recreation access in Pennsylvania](#) shows the results of the analysis. Data is available for a 10-Minute Walk by Municipality & County and a 10-Minute Drive for Trails and Water.
5. Compare public input with existing facilities and conditions.
6. Analyze the condition of existing greenways and riparian forest buffers and the development of additional resources in coordination with statewide initiatives and goals.
7. Analyze open space preservation techniques such as mandatory dedication, overlay zoning, conservation easements, etc.

8. Additional items for Greenways:
  - a. Prepare a base map of the proposed greenways.
  - b. Determine land ownership along corridor and contact non-agency owners to gauge potential support.
  - c. Identify corridor boundary, topography, geology, significant natural features and historic/cultural resources.
  - d. Conduct a wildlife analysis and document negative impacts of corridor development.
  - e. Determine demand and profile of potential user groups (walkers, bikers, etc.)
  - f. Determine potential connections to neighborhoods, businesses, transportation networks, etc.

## **H. FACILITIES AND EQUIPMENT MAINTENANCE**

For agencies that are currently maintaining facilities, analyze the effectiveness of the maintenance program. Agencies without any facilities are provided with an overview of recreation and park maintenance requirements and how they can develop effective maintenance programs to ensure the protection of future capital investments.

1. Describe the current maintenance program and analyze its effectiveness. This includes record keeping, preventive maintenance, use of a maintenance management plan, etc.
2. List major maintenance equipment including age and purpose.
3. Describe existing risk management efforts including inspection of park facilities, specifically playground equipment.
4. Analyze the adequacy of maintenance in relation to the condition of the recreation and park facilities and open space areas.

## **I. RECREATION PROGRAMS AND SERVICES**

For agencies that currently provide programs and services, compare existing offerings to those provided by other entities, the needs/wants of constituents, and professional standards. This comparison helps to determine if the agency provides a sufficiently broad range of cost-effective programs and services that constituents need/want. For agencies interested in providing programs and services, identify new programming areas and discuss an implementation strategy.

1. Provide a list of programs and services sponsored by public, non-profit, and private entities that include:
  - a. Sponsoring group
  - b. Program name
  - c. Participant target age and gender
  - d. Program fee (if any)
2. For agency or publicly sponsored programs and services, provide information about participation trends for the previous five years.
3. Determine availability of programs and services for:
  - a. Active and passive
  - b. Competitive and noncompetitive
  - c. Individuals and groups
  - d. All gender identities

- e. All ages and abilities
  - f. All races and ethnicities
  - g. All income levels
  - h. All education levels
4. Analyze accessibility and inclusiveness of agency programs and services.
  5. Identify program and service deficiencies and develop a strategy for the agency to address them.

## **J. FINANCING**

Identify and analyze current and previous agency funding levels and sources, including tax and non-tax support, and compare to other municipal departments and similar agencies.

1. Compare tax support for recreation and parks in relation to the overall municipal budget and to other departments from the same municipality for the previous 5-year period.
2. Describe the agency philosophy for providing tax support to finance recreation and parks.
3. Compare agency capital and operating expenditures with agencies from municipalities that have similar populations and socio-economic characteristics.
4. Identify and analyze the major revenue sources (taxes, fees, donations, grants, etc.) and amounts used to finance recreation and parks.
5. Describe and analyze the current agency (recreation and park) budget process.
6. Identify new sources to finance recreation and parks and provide examples of their application.

## **K. RECOMMENDATIONS AND COST ESTIMATES**

Outline specific agency priorities and actions to improve recreation and park facilities, programs, and services to meet community needs. Recommendations supported by data analysis and public input must be provided for scope of work elements. Cost estimates must be provided when appropriate.

1. Describe the recommended changes for administration, personnel, facilities, maintenance, programs, services, and financing and provide supporting data to justify the recommendations.
2. Provide a cost estimate to implement each recommendation and discuss potential implementation opportunities and challenges.
3. Additional items for Greenways:
  - a. Provide options for the development of different types of greenways (active, passive, resource protection, etc.).
  - b. Develop a greenway concept plan.
  - c. Phase acquisition and development and identify appropriate protection measures.
4. Each plan component must include:
  - a. An inventory of existing conditions.
  - b. A comparison of existing conditions with local or national standards.
  - c. Recommendations with priorities, timetables, and cost estimates.

**L. PLAN IMPLEMENTATION**

The cohesive and easy to follow five-year implementation plan must:

1. Prioritize the operating-related recommendations
2. Identify the following information for each recommendation:
  - a. Roles and responsibilities of public and non-public agencies.
  - b. Appropriate organizational structure to establish and maintain the facility.
  - c. Target dates for implementation.
  - d. Potential costs.
  - e. Potential funding source(s).
3. Prioritize capital improvement recommendations and provide a multi-year year Capital Development Program organized by short-term (1-3 years), medium-term (4-7 years) and long-term (8 plus years) projects. Identify the following information for each project:
  - a. Facility/area name.
  - b. Description of proposed improvements.
  - c. Total estimated development costs of proposed improvements, including engineering and design costs, project administration costs, acquisition and/or construction costs, and at least a 10% contingency.
  - d. Potential funding source(s).
4. Provide a five-year summary of the projected fiscal impact on the operating budget for operating-related costs associated with administration, personnel, programs, services, and maintenance.

**M. ADDITIONAL SOW ELEMENTS AND/OR RECOMMENDATIONS (*optional*)**

Include additional SOW elements and/or recommendations, as appropriate. These may include, but are not limited to:

1. Greenway Plan
2. Trail Network Plan
3. Pool Feasibility Study
4. Playground Safety Study
5. Concept Designs for Neighborhood Parks
6. Maintenance Management Plan
7. Customer Service and Marketing Plan

**Comprehensive Recreation, Park, and Open Space Plan (CRPOS)**  
**Final Products**

**NARRATIVE REPORT**

A draft final CRPOS Plan must be reviewed and approved by the Grantee and Bureau before it is officially adopted by the Grantee. Typically, the review process consists of reviewing a complete draft plan, providing comments, and reviewing a revised draft plan to ensure comments are adequately addressed.

The final CRPOS Plan must be a narrative, bound report beginning with an executive summary and followed by clearly labeled sections for each of the plan components in logical order. All supporting documents and information should be included in the appendix and not in the body of the report.

Executive Summary – Briefly describe the process, priorities, and final recommendations.

- A. Purpose, Goals, and Objectives
  - B. Public Participation
  - C. Background Information
  - D. Agency Mission Statement, Goals, and Objectives
  - E. Agency Administration
  - F. Agency Personnel
  - G. Facilities and Open Space Inventory and Analysis
  - H. Facilities and Equipment Maintenance
  - I. Recreation Programs and Services
  - J. Financing
  - K. Recommendations and Cost Estimates
  - L. Plan Implementation
  - M. Additional SOW Elements and/or Recommendations (optional)
- Appendix

**REQUIRED DOCUMENT SUBMISSION**

The Grantee should determine the exact number of printed and electronic copies of the CRPOS Plan and state the requirement in the RFP.

The following documents must be submitted to DCNR:

- One (1) electronic PDF of the final CRPOS Plan (as a single document) with the cover signed, sealed, and dated by the design consultant.
- One (1) electronic PDF of other deliverables, as applicable.

**Comprehensive Recreation, Park, and Open Space Plan (CRPOS)**

**DCNR Grant Application Cost Estimate Checklist**

Provide this checklist to a qualified design consultant to develop a detailed cost estimate to be submitted with the DCNR Grant Application. The cost estimate must be detailed for the project to be considered Ready-to-Go during the application review process.

<b>Cost Estimate</b>	<b>Item</b>
_____	<input type="checkbox"/> Executive Summary
_____	<input type="checkbox"/> (A) Purpose, Goals, and Objectives
_____	<input type="checkbox"/> (B) Public Participation
	<input type="checkbox"/> Study Committee Meetings (required; 5-9 people): # _____
	<input type="checkbox"/> Public Meetings (2 required; 1 with elected officials): # _____
	<input type="checkbox"/> Key Person Interviews (required; 10-20 interviews): # _____
	<input type="checkbox"/> Citizen Survey (optional): # _____
	<input type="checkbox"/> Focus Group (optional): # _____
	<input type="checkbox"/> Other (optional): _____
_____	<input type="checkbox"/> (C) Background Information
_____	<input type="checkbox"/> (D) Agency Mission Statement, Goals, and Objectives
_____	<input type="checkbox"/> (E) Agency Administration
_____	<input type="checkbox"/> (F) Agency Personnel
_____	<input type="checkbox"/> (G) Facilities and Open Space Inventory and Analysis
_____	<input type="checkbox"/> (H) Facilities and Equipment Maintenance
_____	<input type="checkbox"/> (I) Recreation Programs and Services
_____	<input type="checkbox"/> (J) Financing
_____	<input type="checkbox"/> (K) Recommendations and Cost Estimates
_____	<input type="checkbox"/> (L) Plan Implementation
_____	<input type="checkbox"/> (M) Additional SOW Item: _____
_____	<input type="checkbox"/> Draft Narrative Report and Other Deliverables, as applicable
_____	<input type="checkbox"/> Final Products
	<input type="checkbox"/> Narrative Report signed, sealed, and dated: # _____
	<input type="checkbox"/> Other, as applicable: # _____
_____	<b>TOTAL</b>