

MIDDLETOWN TOWNSHIP

BUCKS COUNTY, PENNSYLVANIA

REQUEST FOR PROPOSALS

MIDDLETOWN COUNTRY CLUB

FEASIBILITY STUDY AND LONG-TERM OPERATING PLAN

420 N. Bellevue Avenue • Langhorne, Pennsylvania 19047

ANTICIPATED RFP & PROJECT TIMELINE

MILESTONE	ANTICIPATED DATE
RFP Issued	September 15, 2026
Deadline for Written Questions	October 1, 2026
Township Responses / Addendum	October 30, 2026, 12:00 PM
Optional Pre-Proposal Meeting / Site Visit	October 15, 2026, 10:00 AM
Proposals Due	October 23, 12:00 PM
Proposal Evaluation / Interviews	October 26-30, 2026
Selection of Preferred Consultant	November 9, 2026
Notice to Proceed / Project Kick-Off	November 10, 2026
Anticipated Start	January 5, 2027
Draft Feasibility Study	August 4, 2027
Township Review / Final Community Input	August 10, 2027
Final Feasibility Study	September 1, 2027
Final Presentations – Boards	September 2027
Anticipated Project Completion	October 12, 2027

TOWNSHIP CONTACT	PROPOSAL SUBMISSION
Name / Title: Monica Tierney, Interim Director of parks and recreation Email: mtierney@middletownbucks.org	Submission Location / Method: PennBid

TOWNSHIP VISION AND PROJECT OBJECTIVES

Township Vision

Middletown Township envisions Middletown Country Club as a vibrant, financially sustainable, and well-maintained community asset that builds upon the property's more than 100-year history while meeting the recreational, social, and economic needs of the community for generations to come.

The Township recognizes that Middletown Country Club is more than a golf course. The property includes a historic golf course, clubhouse, dining facilities, banquet and event spaces, and other recreational and community amenities that collectively create a destination that serves golfers and non-golfers alike.

The Township's vision is for Middletown Country Club to be a community hub, a place where residents and visitors can play golf, participate in youth and recreational programs, attend community events, gather for meals and social activities, and utilize the facility for weddings, banquets, celebrations, and other functions.

At the same time, the Township recognizes its responsibility as the owner of the property to ensure that the Country Club is operated in a financially responsible manner. The long-term goal is for the facility to generate sufficient revenue to support its ongoing operations, maintenance, and capital improvement needs while reducing reliance on Township resources and, where financially feasible, providing a positive financial return to the Township.

The Township is not seeking to predetermine how this vision should be achieved. Rather, the purpose of this study is to determine the operating structure, investments, programming, and business strategies necessary to achieve these goals and to identify whether those objectives are best accomplished through private management, direct Township operation, or another appropriate operating model.

The Township seeks a long-term strategy that balances financial sustainability, community benefit, responsible stewardship, quality recreation, and preservation of the property's historic character.

Project Objectives

The purpose of the Middletown Country Club Feasibility Study is to provide the Township with the information and analysis necessary to make informed decisions regarding the future operation and investment in the property.

The selected consultant shall evaluate the Country Club with consideration of the following objectives:

1. Determine the Most Appropriate Operating Model

Evaluate the advantages, disadvantages, risks, costs, and opportunities associated with the principal operating alternatives available to the Township, including:

- Continued operation through a private management company;
- Direct operation by Middletown Township; and
- Other appropriate public-private operating or management models.

The analysis shall identify which model provides the strongest opportunity to achieve the Township's financial, operational, recreational, and community objectives.

2. Establish Long-Term Financial Sustainability

Determine how Middletown Country Club can operate as a financially sustainable enterprise capable of supporting its ongoing operations and maintenance.

The consultant shall identify:

- Current financial performance;
- Revenue opportunities;
- Cost-control opportunities;
- Operational efficiencies;
- Appropriate pricing and revenue strategies;
- Potential new or expanded revenue sources; and
- Long-term financial projections.

The study should identify a realistic path toward reducing or eliminating the need for Township financial support of ongoing operations.

3. Support Capital Improvements and Asset Stewardship

Develop a comprehensive understanding of the Country Club's current and future capital needs.

The consultant shall identify the investments necessary to preserve, maintain, and improve the property and shall establish priorities and anticipated costs for those investments.

The study should identify how capital improvements can be funded under each potential operating model and how the Township can ensure that necessary capital investment occurs consistently over time.

4. Maximize the Use of Existing Facilities

Evaluate whether the Country Club's existing buildings, facilities, and amenities are being used to their full potential.

Attention shall be given to:

- Banquet and event facilities;
- Restaurant and food and beverage operations;
- Golf shop;
- Clubhouse;
- Community gathering spaces;
- Junior and youth programming; and
- Other opportunities to increase utilization of the property.

The consultant shall identify opportunities to increase both community use and financial performance.

5. Evaluate the Former Swimming Pool

Assess the condition, potential costs, and future options for the former swimming pool, which has been closed and unused for several years.

The consultant shall evaluate whether the pool should be:

- Rehabilitated;
- Repurposed;
- Removed;
- Replaced with another recreational or community amenity; or
- Otherwise addressed as part of the property's long-term plan.

Any recommendation shall consider cost, liability, community benefit, operational requirements, revenue potential, and applicable restrictions on the property.

6. Strengthen the Country Club as a Community Hub

Review historic uses and identify opportunities for Middletown Country Club to serve a broader segment of the community, including golfers and non-golfers.

Potential opportunities may include:

- Youth and junior golf;
- Community programming;
- Senior programming;
- Recreation and wellness activities;
- Community events;
- Dining and social opportunities;
- Weddings and private events;
- Educational programming;
- Partnerships with local schools and organizations; and
- Other activities that are compatible with the property's recreational purpose.

The consultant shall consider how expanded community use can complement, rather than detract from, the financial performance of the facility.

7. Preserve and Build Upon the Property's Historic Character

Recognize and incorporate the historic significance of Middletown Country Club and its golf course into the long-term strategy.

The consultant shall consider opportunities to preserve the character and legacy of the property while making appropriate improvements necessary to ensure its continued viability and competitiveness.

8. Improve Golf Course Performance and Participation

Evaluate the golf course operation and identify opportunities to improve participation, customer experience, utilization, and financial performance.

The analysis should be considered as appropriate:

- Green fees;
- Membership opportunities;

- Tee-time utilization;
- Outings and tournaments;
- Junior golf;
- Instruction;
- League play;
- Marketing;
- Course improvements;
- Customer experience; and
- Opportunities to attract new and returning golfers.

9. Evaluate Food, Beverage, Banquet, and Event Operations

Determine whether the Country Club's food, beverage, banquet, and event operations are being effectively utilized and whether these operations can become stronger contributors to the overall financial performance of the facility.

The consultant shall evaluate opportunities to improve:

- Revenue;
- Utilization;
- Customer experience;
- Marketing;
- Event programming;
- Staffing;
- Food and beverage operations; and
- Facility investment.

10. Establish a Sustainable Capital Funding Strategy

The Township seeks to avoid a cycle in which necessary capital improvements are deferred until they become significant financial burdens.

- The consultant shall develop a long-term capital funding strategy that considers:
- Annual capital reserves;
- Operating revenues;
- Management agreements;
- Township contributions, if necessary;
- Financing;

- Grants or other outside funding opportunities;
- Capital requirements assigned to a future operator; and
- Other appropriate funding mechanisms.

The strategy should provide the Township with a realistic understanding of the annual financial resources that must be dedicated to maintaining the property over time.

11. Protect the Township's Long-Term Interests

Evaluate each operating model from the perspective of the Township as property owner.

The consultant shall identify:

- Financial risks;
- Operational risks;
- Capital risks;
- Contractual risks;
- Liability considerations;
- Staffing considerations;
- Utility needs assessment;
- Market risks; and
- Other factors that could affect the Township's long-term interests.

The study should identify appropriate safeguards, performance measures, and accountability mechanisms for any recommended operating structure.

12. Incorporate Community Input

Engage residents, golfers, Country Club users, abutting property owners, community organizations, businesses, and other stakeholders in the study process.

The consultant shall use community input to better understand:

- Current perceptions of the Country Club;
- Community priorities;
- Desired recreational and community uses;
- Areas for improvement;
- Potential new programs or amenities; and
- Expectations for the property's future.

- Community input shall inform, but not replace, the consultant's professional, financial, and operational analysis.

13. Develop Measurable Performance Standards

The consultant shall recommend measurable performance standards that the Township can use to evaluate the success of the Country Club under the recommended operating model.

Potential measures may include:

- Revenue;
- Operating margin;
- Capital investment;
- Golf rounds;
- Facility utilization;
- Banquet and event bookings;
- Customer satisfaction;
- Community programming;
- Junior and youth participation;
- Maintenance standards; and
- Financial contribution to the Township.

The consultant should recommend an appropriate framework for ongoing reporting and accountability.

14. Provide a Practical Path Forward

The final study shall provide the Township with more than an assessment of existing conditions. It should provide a practical roadmap for implementation.

The consultant shall identify:

- The recommended operating model;
- Immediate actions;
- Short-term priorities;
- Long-term priorities;
- Required investments;
- Financial requirements;
- Potential procurement steps;

- Contractual considerations;
- Staffing requirements;
- Community engagement considerations; and
- Recommended performance measures.

The Township's objective is to conclude the study with a clear understanding of where Middletown Country Club is today, where it should be in the future, what it will take to get there, and how the Township can measure whether it is successful.

Guiding Principles

In developing its recommendations, the consultant shall consider the following guiding principles:

Community Benefit – The Country Club should provide meaningful recreational, social, and community benefits to Middletown Township and the surrounding region.

Financial Responsibility – The facility should operate in a manner that supports its ongoing expenses and works toward funding its own capital needs.

Long-Term Stewardship – The Township should protect and responsibly maintain the property for future generations.

Quality and Customer Experience – Golfers, residents, guests, event customers, and other users should have access to a high-quality facility and positive experience.

Accessibility and Inclusion – Opportunities should be considered to make the facility welcoming and useful to a broad range of residents and users.

Historic Preservation – The property's unique history and character should be recognized and incorporated into its future.

Accountability – Any future operating structure should establish clear expectations, measurable performance standards, financial transparency, and appropriate Township oversight.

Sustainability – The recommended strategy should be financially and operationally sustainable over the long term rather than focused solely on short-term financial results.

Objective Analysis – Recommendations should be based on reliable data, sound financial analysis, market conditions, community input, and professional judgment rather than a predetermined operating outcome.

SECTION 1. BACKGROUND

The Township of Middletown, Bucks County, Pennsylvania, is soliciting proposals from qualified consulting firms to perform a comprehensive operational, financial, and strategic feasibility study for the municipally owned Middletown Country Club located at 420 North Bellevue Avenue, Langhorne, Pennsylvania.

Middletown Country Club has been an important recreational asset in Bucks County for over one hundred years. Originally established in 1901 and relocated to its current site in 1913, the golf course was designed by noted Scottish golf architect Alexander Findlay. Throughout its history, the course has hosted numerous professional golfers, including World Golf Hall of Fame members Ben Hogan, Gary Player, Johnny Miller, Henry Picard, Leo Diegel, Vic Ghezzi, and George Fazio. Today, the course remains one of Bucks County's most recognizable public golf facilities while continuing to preserve its historic character.

Since 1987, Middletown Township has owned the property and has contracted with a private management company for the operation of the golf course, clubhouse, restaurant, banquet facilities, golf shop, and related amenities. The current management agreement is approaching expiration, providing the Township with the opportunity to evaluate the long-term future of the facility.

The Township seeks an independent, objective assessment of the Country Club's current operations and future potential. Specifically, the Township desires a comprehensive evaluation of whether continued third-party management, a new management operator, or direct municipal operation would provide the greatest long-term benefit to Township residents and taxpayers.

The Township's vision is for Middletown Country Club to be a premier community recreation asset that is financially sustainable, adequately funded for future capital improvements, responsive to community needs, and capable of generating positive financial returns that support both the facility and the Township.

The study shall recognize that the property is municipally owned parkland and that existing deed restrictions and applicable Pennsylvania law require the property to continue to be utilized for recreational purposes, specifically as a golf course. Accordingly, the purpose of this study is not to evaluate alternative land uses, but rather to identify the most effective ownership, operational, management, programming, and investment strategies to maximize the public benefit and financial performance of the facility while preserving its historic and recreational purpose.

SECTION 2. REQUIREMENTS

General Requirements

The Township of Middletown seeks proposals from qualified consulting firms with demonstrated experience in municipal golf course operations, golf facility management, financial analysis, strategic planning, public recreation, and capital asset planning.

The selected consultant shall conduct an independent and objective evaluation of Middletown Country Club and provide recommendations that will assist the Township in determining the most effective long-term operational, financial, and management strategy for the facility.

The Township reserves the right to reject any or all proposals and to select the proposal that it determines to be in the best interest of the Township.

The consultant is encouraged to add to, modify, or clarify any portion of the Scope of Work that, in its professional opinion, will enhance the quality and usefulness of the final study. Any proposed modifications shall be clearly identified and explained in the proposal. At a minimum, however, the consultant's proposal shall address each of the work elements identified below.

Scope of Work

The consultant shall complete a comprehensive study addressing the following components.

1. Existing Conditions Assessment

The consultant shall perform a comprehensive review of the current operation and condition of Middletown Country Club, including, but not limited to:

- Golf course operations
- Golf course maintenance practices
- Clubhouse operations
- Food and beverage services
- Banquet and catering operations
- Golf shop operations
- Staffing and organizational structure
- Membership programs
- Public play operations
- Marketing and branding
- Technology systems
- Customer service practices
- Existing contracts and operational procedures

The consultant shall identify operational strengths, deficiencies, opportunities, and risks.

2. Financial Analysis

The consultant shall perform a comprehensive financial review of the Country Club utilizing available historical operating and financial information.

The analysis shall include, at a minimum:

- Operating revenues and expenditure
- Historical financial performance
- Revenue sources and trends
- Labor costs
- Maintenance costs
- Capital expenditures
- Equipment replacement costs
- Golf operations
- Food and beverage operations
- Banquet operations
- Membership revenues
- Tournament revenues
- Cash flow analysis
- Benchmark comparisons with similar municipal golf facilities

The consultant shall identify operational efficiencies, opportunities for increased revenue, cost savings, and long-term financial sustainability.

3. Operational Alternatives Analysis

A primary objective of this study is to determine the most appropriate long-term operational model for Middletown Country Club.

The consultant shall evaluate and compare multiple operating scenarios, including:

- Continued operation through a private management company selected through a competitive procurement process.
- Direct operation by Middletown Township.
- Alternative public-private partnership models or other innovative operational structures.

For each operational alternative, the consultant shall evaluate:

- Organizational structure
- Staffing requirements
- Financial implications
- Operational risks
- Required Township oversight
- Advantages and disadvantages
- Transition requirements
- Estimated implementation costs
- Long-term financial performance

The consultant shall provide a recommendation supported by objective analysis and financial projections.

4. Capital Asset and Facility Assessment

The consultant shall assess the condition, functionality, and remaining useful life of all significant physical assets associated with Middletown Country Club.

The assessment shall include, but not be limited to:

- Golf course infrastructure
- Greens, tees, fairways, and bunkers

- Irrigation system
- Drainage system
- Cart paths
- Practice facilities
- Maintenance buildings
- Maintenance equipment fleet
- Clubhouse
- Restaurant and kitchen facilities
- Ballroom, Manor Room, and Windsor Room
- Golf shop
- Parking areas
- Utilities
- Mechanical systems
- Building envelope
- Americans with Disabilities Act (ADA) accessibility considerations

The consultant shall prepare a prioritized capital improvement plan identifying immediate, short-term (1-5 years), medium-term (5-10 years), and long-term capital investment needs together with estimated construction costs and recommended funding priorities.

5. Banquet and Event Facilities Assessment

The consultant shall evaluate the existing banquet, catering, restaurant, and event facilities to determine their current utilization, financial performance, market competitiveness, and future opportunities.

The analysis shall include recommendations regarding:

- Weddings
- Corporate events
- Community events
- Private parties
- Funeral luncheons
- Catering services
- Restaurant operations
- Facility improvements
- Revenue enhancement opportunities

The consultant shall specifically evaluate the feasibility of continued, expanded, renovated, or otherwise improved use of the existing banquet and event facilities as supporting amenities of the overall Country Club and recreational complex.

6. Former Pool Facility Assessment

The consultant shall evaluate the existing swimming pool facility, which has been closed for several years, and determine its current condition and future potential.

The evaluation shall include:

- Existing structural condition
- Estimated renovation costs
- Estimated demolition costs
- Alternative recreational uses consistent with the property's deed restrictions
- Potential operational models
- Financial feasibility
- Community demand
- Return on investment

The consultant shall evaluate the feasibility of reopening and operating the existing pool as a recreational amenity associated with the Country Club, including the anticipated capital, operating, staffing, maintenance, insurance, and liability implications. Any alternative use of the pool facility shall be evaluated for consistency with applicable deed restrictions and other legal requirements.

7. Community Needs Assessment

The consultant shall evaluate how Middletown Country Club can better serve Township residents while maintaining financial sustainability.

The consultant shall solicit public input through stakeholder interviews, surveys, or public meetings and evaluate opportunities to expand community programming, including:

- Junior golf
- Youth instruction

- High school and collegiate partnerships
- Senior programming
- Community events
- Recreational programming
- Walking and wellness opportunities
- Family activities
- Food and beverage programming

Recommendations shall balance community benefit with long-term financial performance.

8. Market and Comparative Analysis

The consultant shall compare Middletown Country Club with comparable municipally owned golf facilities operated under both municipal and private management models.

The analysis shall include:

- Comparable facilities
- Fee structures
- Membership programs
- Revenue generation
- Operational efficiencies
- Capital investment strategies
- Best management practices

Successful municipal golf operations from Pennsylvania and surrounding states should be considered where appropriate.

9. Legal and Governance Considerations

The consultant shall review all available information regarding legal and operational constraints affecting the facility, including existing management agreements, applicable deed restrictions, grant obligations, and public ownership considerations.

The consultant shall acknowledge that Middletown Country Club is municipally owned parkland and that any recommendations shall be consistent with applicable legal restrictions governing the continued recreational use of the property.

The property is subject to restrictions governing dedicated public parkland and its continued recreational use as a golf course. The feasibility study shall therefore focus on management, operational, financial, capital, and recreational strategies that maintain the property's established public park and golf course use. The study shall not assume or recommend conversion of the property to unrelated public use or disposition of the property unless specifically identified as requiring additional legal review and approval.

The consultant may evaluate the continued use, renovation, rehabilitation, and operation of existing supporting amenities, including the banquet facilities and former swimming pool, provided such recommendations are consistent with applicable deed restrictions and do not materially alter or eliminate the established golf course use. The consultant shall identify any recommendations that may require additional legal review, approvals, or other governmental action.

Liability and Risk Analysis

The consultant shall conduct an assessment of significant liability and risk considerations associated with the continued operation and potential future operation of Middletown Country Club. The analysis shall consider, at a minimum:

- General premises and public-use liability
- Golf course-related risks, including play, spectators, golf carts, and course conditions
- Swimming pool and aquatic facility liability, if reopening is considered
- Banquet, catering, restaurant, and special event liability
- Alcohol-related operational risks, where applicable
- Employee and workplace safety considerations
- Maintenance and facility-related risks
- ADA accessibility and related exposure
- Insurance requirements and coverage considerations
- Indemnification and insurance provisions in management, vendor, and operating agreements
- Risk allocation between the Township and any private management company or operating partner
- Potential changes in liability exposure under each operating model evaluated.

- Recommended risk management practices, contractual protections, insurance requirements, and operational controls

The consultant shall identify material liability risks associated with each operational alternative and provide recommendations for mitigating those risks. The analysis should distinguish between risks that may be addressed through operational practices, insurance, contractual provisions, facility improvements, or other measures. Where legal interpretation is required, the consultant shall identify the issue for review by Township counsel rather than providing a legal opinion.

10. Final Report and Presentation

Upon completion of the study, the consultant shall prepare a comprehensive written report that includes:

- Executive Summary
- Existing Conditions Assessment
- Financial Analysis
- Market Analysis
- Operational Alternatives Evaluation
- Capital Improvement Plan
- Utilities needs assessment
- Community Needs Assessment
- Legal governance and Liability considerations
- Implementation Strategy
- Recommended Operational Model
- Ten-Year Financial Pro Forma
- Capital Investment Schedule

The consultant shall present the draft findings to Township staff for review and subsequently present the final report and recommendations to the Middletown Township Board of Supervisors at a public meeting.

The Township intends to utilize this study as the primary planning document for determining the future management, operation, and investment strategy for Middletown Country Club following the expiration of the current management agreement. The recommendations should therefore provide a practical, data-driven roadmap that enables the Township to preserve the historic legacy of Middletown

Country Club while ensuring it remains a vibrant, financially sustainable community asset for generations to come.

SECTION 3. COMMUNITY AND STAKEHOLDER ENGAGEMENT

Public participation is an essential component of this study. The selected consultant shall develop and implement a community engagement program designed to gather meaningful input from residents, golf patrons, community organizations, Township advisory boards, and elected officials. The engagement process shall ensure that recommendations reflect both sound business practices and the recreational needs and priorities of the Middletown Township community.

The consultant shall prepare a Community Engagement Plan for Township review at the outset of the project. The plan shall identify the methods of public outreach, proposed meeting schedule, stakeholder groups, and opportunities for public participation throughout the study.

At a minimum, the public engagement program shall include the following:

Stakeholder Interviews

The consultant shall conduct interviews with key stakeholders to obtain insight into the current operation of the facility and opportunities for future improvement. Stakeholders should include, at a minimum:

- Township Manager and appropriate Township staff
- Representatives of the current management company
- Parks and Recreation Board representatives
- Board of Supervisors representatives
- Golf course staff
- Golf professionals
- Regular golfers and members
- Restaurant and banquet users
- Local business representatives
- Youth golf organizations
- Neighbors
- High school or collegiate golf representatives, where applicable
- Other stakeholders identified by the Township

The consultant should conduct approximately fifteen (15) to twenty-five (25) stakeholder interviews.

Public Survey

The consultant shall develop an online public survey, with Township review and approval, to solicit input from residents, golfers, facility users, and other interested parties.

The survey should gather information regarding:

- Current use of Middletown Country Club
- Overall satisfaction with the facility
- Desired amenities and improvements
- Community programming opportunities
- Food and beverage services
- Banquet and event facilities
- Future recreational opportunities
- Opinions regarding operational priorities

The consultant shall summarize survey results and incorporate the findings into the final report.

Public Open House No. 1 – Visioning Session

Following completion of the initial data collection and existing conditions assessment, the consultant shall conduct one public open house to introduce the study, present existing conditions, and obtain public input regarding community priorities, opportunities, and concerns.

The meeting should include opportunities for attendees to provide written and verbal comments, participate in interactive exercises, and ask questions.

Parks and Recreation Board Workshop

Following completion of the existing conditions assessment and preliminary analysis, the consultant shall present findings and receive input from the Middletown Township Parks and Recreation Board at a publicly advertised meeting.

The presentation should include:

- Existing conditions
- Preliminary financial observations

- Operational strengths and weaknesses
- Community input received to date
- Potential operational alternatives

Comments from the Parks and Recreation Board shall be incorporated into the development of the draft recommendations.

Public Open House No. 2 – Draft Recommendations

Upon completion of the draft study, the consultant shall conduct a second public meeting to present preliminary recommendations and receive additional public comment prior to finalizing the report.

The meeting shall summarize:

- Financial findings
- Capital improvement priorities
- Operational alternatives
- Recommended management model
- Implementation strategy

The consultant shall provide an opportunity for public comment and prepare a summary of comments received.

Board of Supervisors Work Session

Prior to completion of the final report, the consultant shall conduct a work session with the Board of Supervisors to review the draft recommendations, answer questions, and receive policy direction.

The purpose of this meeting shall be to ensure that the draft report addresses Township priorities before preparation of the final document.

Final Presentation

Upon completion of the study, the consultant shall present the final report and recommendations at a public meeting of the Board of Supervisors.

The presentation shall summarize:

- Existing conditions
- Financial analysis
- Market assessment

- Capital improvement recommendations
- Community engagement results
- Operational alternatives
- Recommended management model
- Ten-year implementation strategy

Electronic copies of all presentation materials, meeting summaries, public comments, survey results, and supporting documentation shall be provided to the Township as part of the final deliverables.

Community Engagement Deliverables

At the completion of the engagement process, the consultant shall provide:

- Community Engagement Plan
- Stakeholder Interview Summary
- Public Survey Results and Analysis
- Meeting Agendas and Presentation Materials
- Public Meeting Summaries
- Summary of Public Comments
- Responses to Major Themes Identified During Public Engagement
- Documentation describing how public input informed the consultant's recommendations

SECTION 4. ORGANIZATION AND REQUIRED PROPOSAL SUBMITTALS

To facilitate a comprehensive and uniform evaluation of proposals, all firms responding to this Request for Proposals shall organize their submissions in the following format.

Letter of Transmittal

The proposal shall include a Letter of Transmittal signed by an individual authorized to bind the firm contractually. The letter shall include:

- A statement indicating the firm's understanding of the project and the services requested.
- A statement affirming the firm's ability and commitment to perform the required services.

- The name, title, address, telephone number, and email address of the firm's primary contact for the proposal.
- A statement identifying any actual or potential conflicts of interest.
- A disclosure of any current or previous contractual relationships with Middletown Township or Middletown Country Club.
- A statement that the proposal shall remain valid for a period of ninety (90) days following the submission deadline.

Firm Qualifications and Experience

Provide a description of the firm, including:

- History of the firm.
- Office location(s).
- Areas of professional expertise.
- Experience with municipal golf courses.
- Experience with golf course operations and management.
- Experience evaluating municipal versus private operational models.
- Experience preparing financial feasibility studies and business plans.
- Experience conducting capital improvement planning.
- Experience facilitating public engagement processes.
- Any specialized qualifications relevant to this project.

Project Team

Identify the individuals who will be assigned to this project and provide:

- Organizational chart.
- Project Manager.
- Key personnel and their responsibilities.
- Relevant experience of each team member.
- Resumes of all principal staff.
- Any proposed subconsultants and their areas of responsibility.

The Township expects the individuals identified in the proposal to remain assigned to the project unless otherwise approved by the Township.

Project Understanding and Technical Approach

Describe the firm's understanding of the project and present a detailed work plan explaining how the study will be completed.

The proposal should include:

- Overall project approach.
- Methodology.
- Data collection methods.
- Financial analysis approach.
- Operational evaluation methodology.
- Capital asset assessment methodology.
- Public engagement strategy.
- Benchmarking approach.
- Risk assessment methodology.
- Deliverables.
- Quality assurance and quality control procedures.

The consultant is encouraged to identify any additional work elements that would enhance the value of the study.

Project Schedule

Provide a proposed project schedule identifying all major milestones, including:

- Project kickoff meeting.
- Existing conditions assessment.
- Stakeholder interviews.
- Public survey.
- Public Open House No. 1.
- Parks and Recreation Board presentation.
- Draft report.
- Public Open House No. 2.
- Board of Supervisors work session.
- Final report.
- Final presentation to the Board of Supervisors.

Similar Project Experience

Provide descriptions of at least five (5) projects completed within the past ten (10) years that are similar in scope.

Preference will be given to firms with demonstrated experience involving:

- Municipally owned golf courses.
- Public golf facilities.
- Country club operational studies.
- Municipal recreation facilities.
- Financial feasibility studies.
- Public-private partnership evaluations.

For each project provide:

- Client name.
- Project location.
- Project description.
- Date completed.
- Total project cost.
- Name and contact information for the client representative.

References

Provide a minimum of five (5) client references, with preference of three (3) municipal clients for whom comparable work has been completed.

References shall include:

- Organization.
- Contact person.
- Title.
- Telephone number.
- Email address.
- Brief description of services provided.

Cost Proposal

Provide a detailed cost proposal including:

- Lump sum fee.

- Hourly billing rates.
- Estimated hours by task.
- Estimated hours by staff member.
- Reimbursable expenses.
- Optional services, if any.
- Total not-to-exceed fee.

Costs shall be organized by each major task identified in the Scope of Work.

Proposed Deliverables

Describe all reports, presentations, graphics, financial models, and supporting materials that will be provided.

Indicate the number of printed copies, electronic copies, GIS files (if applicable), spreadsheets, and presentation materials that will be included.

Required Certifications

The proposal shall include all required Township forms and certifications, including but not limited to:

- Non-Collusion Affidavit.
- Non-Discrimination Certification.
- Certificate of Insurance (upon award).
- W-9.
- Professional Licenses, where applicable.
- Any additional forms required by the Township.

Optional Value-Added Services

The Township encourages firms to identify additional services or innovative ideas that may improve the overall value of the study. Such recommendations may include additional analysis, visualization tools, public engagement techniques, implementation planning, grant funding strategies, or operational best practices that are not specifically identified in this Request for Proposals.

Consultant Perspective and Experience

In addition to the information requested elsewhere in this Request for Proposals, the Township requests that each proposer provide narrative responses to the following

questions. Responses should demonstrate the firm's understanding of the project, its experience with similar assignments, and its ability to provide practical, implementable recommendations.

1. Opportunities for Middletown Country Club

Based on the information provided in this Request for Proposals and the consultant's professional experience, identify what you believe are the three (3) greatest opportunities for Middletown Country Club over the next ten (10) years.

The Township recognizes that proposers have not yet completed a comprehensive analysis of the facility. The intent of this question is to better understand the proposer's initial observations, strategic thinking, creativity, and approach to municipal golf and recreational facility operations.

In addition to identifying the three greatest overall opportunities, proposers should provide brief initial observations regarding the following:

- Golf operations and customer experience
- Banquet, event, food and beverage, and other clubhouse opportunities
- Former swimming pool and recreational amenities
- Capital investment and facility improvements
- Community programming and public benefit
- Management and governance structure
- Liability, risk management, and operational risk

For each of the three (3) greatest opportunities identified, the proposer should briefly describe:

- Why the opportunity is significant
- The potential benefit to the Township and community
- Key considerations or challenges associated with pursuing the opportunity
- What additional information or analysis would be necessary to determine its feasibility

Proposers are not expected to perform detailed financial, engineering, market, legal, or operational analysis as part of their response. The Township is seeking high-level strategic observations based on the information available at the proposal stage.

2. Experience Evaluating Municipal Golf Operations

Describe your firm's experience evaluating municipally owned golf courses and determining whether facilities should be:

- Operated directly by a municipality;
- Managed by a third-party operator; or
- Operated through another public-private partnership model.

Provide examples of comparable projects, summarize the recommendations made, and describe the outcomes where available. The Township is particularly interested in understanding the factors your firm considers when recommending one operational model over another.

3. Experience Developing Implementation Strategies

Describe your experience preparing implementation plans that have been adopted by municipal governing bodies.

Include examples of projects where your recommendations resulted in measurable operational improvements, increased financial sustainability, enhanced public recreation opportunities, or successful capital investment planning.

Discuss how your firm develops practical, phased implementation strategies that recognize municipal budgeting, staffing, governance, and public engagement considerations.

4. Unique Qualifications

Describe any unique qualifications, innovative methodologies, specialized expertise, or value-added services that distinguish your firm from other consultants and would enhance the Township's ability to make informed decisions regarding the future of Middletown Country Club.

SECTION 5. EVALUATION CRITERIA

Proposals will be evaluated by the Township using the criteria outlined below. The Township intends to select the proposal that, in its judgment, best demonstrates the

qualifications, experience, technical expertise, and overall value necessary to successfully complete the requested services.

The Township reserves the right to reject any or all proposals, waive informalities or irregularities, request additional information from any proposer, conduct interviews, negotiate with one or more firms, and make an award that is determined to be in the best interest of the Township.

Evaluation Criteria

Proposals will be evaluated using the following criteria:

Evaluation Criteria	Maximum Points
Firm Qualifications and Experience	20
Experience with Municipal Golf Courses, Public Recreation Facilities, and Similar Projects	20
Project Understanding and Technical Approach	20
Qualifications and Experience of the Proposed Project Team	15
Community Engagement Strategy and Communication Approach	10
Quality of Similar Project Experience, References, and Sample Work Product	10
Cost Proposal	5
Total	100

1. Firm Qualifications and Experience (20 Points)

The Township will evaluate the overall qualifications, stability, and experience of the consulting firm, including its demonstrated ability to complete projects of similar size and complexity for municipal clients.

Consideration will be given to:

- Experience providing professional consulting services to municipalities.
- Experience conducting operational and financial analyses.
- Experience preparing strategic plans and feasibility studies.
- Familiarity with municipal governance and public decision-making processes.

2. Municipal Golf and Recreation Experience (20 Points)

The Township places significant value on experience involving municipally owned golf courses and similar public recreational facilities.

Consideration will include:

- Experience evaluating municipal golf operations.
- Experience comparing municipal and third-party management models.
- Experience with golf course financial performance.
- Experience with clubhouse, food and beverage, banquet, and event operations.
- Experience preparing capital improvement and asset management plans.

3. Project Understanding and Technical Approach (20 Points)

The Township will evaluate the consultant's understanding of the project objectives and the proposed methodology for completing the Scope of Services.

Consideration will include:

- Thoroughness of the proposed work plan.
- Soundness of analytical methods.
- Understanding of operational and financial issues.
- Ability to develop practical and implementable recommendations.
- Overall quality and organization of the proposal.

4. Project Team (15 Points)

The Township will evaluate the qualifications and experience of the individuals assigned to the project.

Consideration will include:

- Experience of the Project Manager.
- Qualifications of key personnel.
- Relevant expertise of subconsultants.
- Availability of project staff.
- Experience working together on comparable assignments.

5. Community Engagement Strategy (10 Points)

The Township will evaluate the consultant's proposed approach to engaging residents, stakeholders, advisory boards, Township staff, and elected officials throughout the study process.

Consideration will include:

- Public engagement techniques.
- Stakeholder outreach.
- Communication methods.
- Facilitation experience.
- Ability to build consensus while obtaining meaningful public input.

6. Similar Project Experience, References, and Sample Work Product (10 Points)

The Township will evaluate the quality of comparable projects completed by the consultant, client references, and submitted sample work products.

Consideration will include:

- Relevance of comparable projects.
- Client satisfaction.
- Demonstrated implementation of recommendations.
- Quality, clarity, and usefulness of previous reports.

7. Cost Proposal (5 Points)

The Township will evaluate the proposed fee in relation to the scope of services, project approach, level of effort, qualifications of the proposed team, and overall value provided.

Selection will not be based solely upon the lowest proposed cost.

Interviews

Following review of the written proposals, the Township may invite one or more firms to participate in interviews or presentations.

Interviews may include discussions of:

- The consultant's understanding of the project.
- Technical approach.
- Project team.

- Community engagement strategy.
- Project schedule.
- Cost proposal.
- Responses to questions from the evaluation committee.

The Township reserves the right to select a consultant based solely upon the written proposals or, alternatively, to conduct interviews prior to making a final selection.

Award

The Township intends to award a contract to the consultant whose proposal is determined to be most advantageous to the Township, taking into consideration the evaluation criteria outlined herein.

SECTION 6. GENERAL CONDITIONS

Right to Reject Proposals

The Township reserves the right to reject any or all proposals, to waive any informalities or irregularities in the proposals received, to request additional information from any proposer, and to accept the proposal that, in the judgment of the Township, is in the best interest of the Township.

Right to Negotiate

The Township reserves the right to negotiate the scope of services, project schedule, compensation, and contract terms with the highest-ranked proposer. If negotiations are unsuccessful, the Township reserves the right to terminate negotiations and begin negotiations with another qualified proposer.

Proposal Validity

All proposals submitted in response to this Request for Proposals shall remain valid for a period of ninety (90) calendar days following the proposal submission deadline.

Requests for Clarification

The Township reserves the right to request clarification, supplemental information, or supporting documentation from any proposer during the evaluation process. Requests for clarification shall not permit material changes to the proposal.

Questions and Addenda

Questions concerning this Request for Proposals shall be submitted in writing to the Township by the deadline established in the procurement schedule.

Responses to questions and any revisions to this Request for Proposals shall be issued by written addendum. All addenda shall become part of the Request for Proposals and shall be acknowledged by each proposer in its submission.

Ownership of Proposals

Upon submission, all proposals and supporting materials shall become the property of Middletown Township and will not be returned.

Pennsylvania Right-to-Know Law

Proposals submitted to the Township may be subject to public disclosure pursuant to the Pennsylvania Right-to-Know Law (65 P.S. §§ 67.101 et seq.).

If a proposer believes portions of its proposal contain confidential proprietary or trade secret information exempt from disclosure, those portions shall be clearly identified and marked. The Township shall make any determination regarding disclosure in accordance with applicable law and does not guarantee that information identified by a proposer as confidential will be exempt from disclosure.

Reservation of Rights

The Township reserves the right to:

- Reject any or all proposals.
- Waive informalities or minor irregularities.
- Request additional information from any proposer.
- Conduct interviews or presentations.
- Investigate the qualifications of any proposer.
- Negotiate with one or more proposers.
- Award a contract in whole or in part.
- Amend or cancel this Request for Proposals.
- Reissue the Request for Proposals.
- Make an award that is determined to be in the best interest of the Township.

Contract Negotiations

The successful proposer shall enter into a Professional Services Agreement with Middletown Township. The final agreement shall incorporate the requirements of this Request for Proposals, the consultant's proposal, negotiated modifications, and any other terms deemed necessary by the Township and Township Solicitor.

The Township reserves the right to negotiate revisions to the scope of services, project schedule, compensation, staffing, and deliverables prior to execution of the agreement.

No Guarantee of Award

Issuance of this Request for Proposals does not obligate the Township to award a contract or to pay any costs incurred in preparing or submitting a proposal.

The Township reserves the right to cancel this solicitation at any time before execution of a contract if it is determined to be in the Township's best interest.

Proposal Preparation Costs

All costs associated with preparing and submitting a proposal, participating in interviews, responding to requests for clarification, or otherwise participating in the procurement process shall be borne solely by the proposer.

The Township shall not reimburse any proposer for such costs.

Compliance with Laws

The successful consultant shall comply with all applicable federal, Commonwealth of Pennsylvania, and local laws, regulations, ordinances, codes, licensing requirements, and professional standards applicable to the performance of the work.

Conflict of Interest

Each proposer shall disclose any actual or potential conflicts of interest that could affect its ability to provide objective and independent professional services.

This disclosure shall include, but not be limited to:

- Current or previous contractual relationships with Middletown Township.
- Current or previous contractual relationships with Middletown Country Club.
- Current or previous contractual relationships with the existing management company.

- Financial interests that could create an actual or perceived conflict.
- Any other circumstances that may impair the consultant's objectivity.

Failure to disclose a conflict of interest may result in disqualification or termination of any resulting contract.

Equal Opportunity

The Township is committed to equal opportunity in contracting.

The successful consultant shall comply with all applicable federal, state, and local equal employment opportunity and non-discrimination laws and regulations.

Insurance Requirements

Prior to execution of a Professional Services Agreement, the selected consultant shall furnish certificates of insurance evidencing coverage with insurers authorized to conduct business in the Commonwealth of Pennsylvania.

At a minimum, the consultant shall maintain:

- Commercial General Liability Insurance.
- Automobile Liability Insurance covering owned, non-owned, and hired vehicles.
- Workers' Compensation Insurance as required by Pennsylvania law.
- Employer's Liability Insurance.
- Professional Liability (Errors and Omissions) Insurance.

The Township reserves the right to establish minimum coverage limits and require Middletown Township to be named as an additional insured where appropriate.

All insurance shall remain in effect throughout the duration of the contract.

The Township reserves the right to request documentation verifying any certification contained herein.

Independent Contractor

The successful consultant shall perform all services as an independent contractor and not as an employee, agent, or representative of Middletown Township.

Nothing contained in this Request for Proposals or any resulting agreement shall be construed to create a partnership, joint venture, employer-employee relationship, or agency relationship between the Township and the consultant.

Professional Services Agreement

The successful proposer shall execute the Township's standard Professional Services Agreement, subject to review and approval by the Township Solicitor.

Submission of a proposal shall constitute acknowledgment that the proposer is willing to negotiate and execute the Township's standard agreement.

Any requested exceptions to the Township's contract terms shall be clearly identified within the proposal. Failure to identify requested exceptions may be interpreted as acceptance of the Township's standard contract provisions.

Ownership of Work Product

All reports, studies, data, analyses, financial models, drawings, maps, photographs, digital files, presentations, and other work products prepared under the resulting contract shall become the property of Middletown Township upon payment for services rendered.

The Township shall have unrestricted rights to reproduce, distribute, modify, and utilize all work products for governmental purposes.

The consultant may retain copies for its records but shall not publish or distribute project materials without the Township's prior written consent.

SECTION 7. INSURANCE REQUIREMENTS

The successful consultant shall obtain and maintain, at its own expense, insurance coverage sufficient to protect the consultant, its employees, agents, subcontractors, and the Township from claims, liabilities, losses, and damages arising out of or related to the performance of the services required under the resulting Professional Services Agreement.

All insurance shall be maintained for the duration of the contract and shall be issued by insurance companies authorized to conduct business in the Commonwealth of Pennsylvania and having a financial strength rating reasonably acceptable to the Township.

The consultant shall provide certificates of insurance to the Township prior to execution of the Professional Services Agreement and prior to commencing any services.

Minimum Insurance Requirements

At a minimum, the consultant shall maintain the following insurance coverage:

1. Commercial General Liability

Commercial General Liability Insurance covers bodily injury, personal injury, property damage, contractual liability, and other customary risks associated with the performance of professional services and related activities.

Minimum limits shall be:

- \$1,000,000 per occurrence
- \$2,000,000 general aggregate

2. Automobile Liability

Automobile Liability Insurance covering owned, hired, and non-owned vehicles used in connection with the performance of the services.

Minimum limits shall be:

- \$1,000,000 combined single limit per accident

3. Workers' Compensation

Workers' Compensation Insurance shall be maintained in accordance with all requirements of the Commonwealth of Pennsylvania and shall cover all employees engaged in the performance of the contract.

4. Employer's Liability

Employer's Liability Insurance shall be maintained with minimum limits of:

- \$500,000 each accident
- \$500,000 disease – each employee
- \$500,000 disease – policy limit
- Professional Liability / Errors and Omissions

Professional Liability Insurance, including Errors and Omissions coverage, shall be maintained for claims arising from errors, omissions, negligent acts, or failure to perform professional services in accordance with applicable professional standards.

Minimum limits shall be:

- \$2,000,000 per claim
- \$2,000,000 aggregate

The professional liability policy shall remain in effect throughout the term of the contract. The Township may require the consultant to maintain professional liability coverage, or an appropriate extended reporting period, for a reasonable period following completion of the services.

Additional Insured

Middletown Township, its elected officials, officers, employees, agents, and representatives shall be named as additional insureds on the consultant's Commercial General Liability and Automobile Liability policies, to the extent permitted by the applicable policies.

Coverage provided to the Township shall be primary and non-contributory with respect to any insurance maintained by the Township.

Waiver of Subrogation

To the extent permitted by law and the applicable insurance policies, the consultant shall provide a waiver of subrogation in favor of Middletown Township with respect to Workers' Compensation and other applicable coverage.

Certificates of Insurance

Prior to commencing work, the consultant shall provide the Township with certificates of insurance demonstrating compliance with all requirements of this section.

Certificates shall identify:

- The name of the insured consultant.
- Insurance carrier.
- Policy number.
- Policy effective and expiration dates.
- Coverage limits.
- Applicable endorsements.
- Additional insured status, where required.

Copies of applicable additional insured endorsements may be required by the Township.

Notice of Cancellation or Material Change

The consultant shall provide the Township with reasonable notice of any cancellation, non-renewal, reduction in coverage, or material change in any required insurance policy.

The consultant shall not permit any required coverage to lapse during the term of the contract.

Subconsultants

The consultant shall require all approved subconsultants performing services under the contract to maintain insurance appropriate to the nature and scope of their work.

Upon request, the consultant shall provide the Township with evidence that each subconsultant maintains the required insurance coverage.

The consultant shall remain responsible for ensuring that its subconsultants comply with applicable insurance requirements.

No Limitation of Liability

The insurance requirements contained in this section shall not be construed as limiting the consultant's liability or responsibility under the Professional Services Agreement.

The consultant shall remain responsible for all claims, damages, losses, costs, and expenses arising from its acts, omissions, negligence, or failure to perform the services in accordance with the contract.

Changes in Insurance Requirements

The Township reserves the right to reasonably modify insurance requirements prior to execution of the Professional Services Agreement based upon the final scope of services, recommendations of the Township's insurance advisor, or requirements of the Township's standard professional services agreement.

Any such modifications shall be communicated to the selected consultant prior to execution of the agreement.

SECTION 8. RESPONSIBLE CONTRACTOR REQUIREMENTS

Middletown Township intends to enter into a professional services agreement with a consultant that is qualified, responsible, financially capable, and able to successfully perform the services described in this Request for Proposals.

Each proposer shall demonstrate that it possesses the qualifications, experience, professional resources, and organizational capacity necessary to complete the project in a timely and professional manner.

General Responsibility Requirements

The proposer shall certify that it:

1. Is legally authorized to conduct business in the Commonwealth of Pennsylvania.
2. Is properly licensed, registered, or otherwise authorized to provide the professional services included in this Request for Proposals.
3. Possesses the experience, expertise, personnel, and organizational resources necessary to successfully complete the project.
4. Has sufficient financial and organizational capacity to perform the work without interruption.
5. Is not currently suspended, debarred, or otherwise prohibited from contracting with the Commonwealth of Pennsylvania, the federal government, or any political subdivision or public agency.
6. Is not currently involved in bankruptcy proceedings or other circumstances that would materially impair its ability to perform the services.
7. Has not been found guilty of or entered a plea of guilty or nolo contendere to, fraud, bribery, corruption, or other criminal conduct related to the performance of professional or governmental contracts, to the extent disclosure is required by applicable law.
8. Has not had a professional services contract terminated for cause within the previous five (5) years, unless fully disclosed in the proposal.
9. Has not been debarred or suspended from participation in public contracting within the previous five (5) years, unless fully disclosed in the proposal.
10. Will comply with all applicable federal, state, and local laws, ordinances, regulations, and professional standards applicable to the performance of the services.

Professional Qualifications

The proposer shall maintain all professional licenses, registrations, certifications, and other credentials required for the services it proposes to provide.

Where the proposal includes subconsultants or specialized professionals, the proposer shall identify those individuals or firms and provide evidence of their relevant qualifications.

The Township reserves the right to verify the qualifications and credentials of the proposer and any proposed subconsultant.

Experience and Performance

The proposer shall demonstrate a satisfactory record of performance on projects of similar size, scope, and complexity.

The Township may consider:

- Prior experience with municipal governments.
- Experience with municipally owned golf courses and recreational facilities.
- Experience conducting feasibility and financial studies.
- Experience evaluating public and private operating models.
- Experience with capital improvement and asset management planning.
- Experience with community engagement and public presentations.
- Quality and timeliness of previous work.
- References provided by previous clients.
- Any material disputes, claims, contract terminations, or other performance concerns involving comparable projects.

The Township reserves the right to contact references and other governmental or professional entities to verify information provided by the proposer.

Financial and Organizational Capacity

The proposer shall have sufficient financial and organizational resources to perform the services throughout the anticipated project duration.

Upon reasonable request, the Township may require the selected consultant to provide documentation demonstrating its ability to meet its contractual obligations.

Any financial information submitted that is claimed to be confidential shall be handled in accordance with applicable Pennsylvania law, including the Pennsylvania Right-to-Know Law.

Litigation and Claims

Each proposer shall disclose any material litigation, arbitration, professional liability claim, or governmental investigation involving the firm or its principals that relates to professional services provided to a public or private client during the previous five (5) years.

The disclosure shall briefly describe the nature of the matter and its current status.

The existence of a disclosed claim or proceeding shall not automatically disqualify a proposer. The Township may consider the nature, circumstances, and disposition of the matter in evaluating the proposer's responsibility and qualifications.

False or Misleading Information

The Township reserves the right to reject any proposal if it determines that the proposer has provided materially false, misleading, or incomplete information in its proposal or in response to a request for additional information.

If materially false or misleading information is discovered after contract award, the Township reserves all rights and remedies available under the resulting agreement and applicable law, including termination of the contract.

Subconsultants

The proposer shall identify all proposed subconsultants in its proposal and shall provide sufficient information regarding each subconsultant to allow the Township to evaluate its qualifications and responsibility.

The selected consultant shall be responsible for the performance of all approved subconsultants.

The use of a subconsultant shall not relieve the selected consultant of any obligation or responsibility under the resulting Professional Services Agreement.

No material change in the proposed project team or use of subconsultants shall be made without prior approval from the Township.

Certification of Responsibility

Each proposer shall include a signed certification confirming that the information provided regarding its responsibility and qualifications is true and accurate to the best of its knowledge.

The Township may request additional documentation or certifications prior to contract award.

Failure to provide the required certification or requested supporting documentation may result in the proposal being deemed non-responsive or the proposer being deemed not responsible.

Township Determination of Responsibility

The Township shall have the sole discretion, subject to applicable law, to determine whether a proposer is responsible and capable of performing the services required under this Request for Proposals.

In making this determination, the Township may consider the proposer's:

- Experience;
- Qualifications;
- Professional reputation;
- Financial and organizational capacity;
- Past performance;
- References;
- Litigation and claims history;
- Compliance with applicable laws;
- Conflicts of interest; and
- Ability to successfully complete the project within the proposed schedule and budget.

A proposer that meets the minimum requirements of this RFP is not automatically entitled to an award of the contract.

SECTION 9. EQUAL OPPORTUNITY / NON-DISCRIMINATION

Middletown Township is committed to providing equal opportunity in its procurement and contracting practices and expects all proposers and contractors to conduct their business in a manner consistent with applicable federal, Commonwealth of Pennsylvania, and local laws concerning equal opportunity and non-discrimination.

Equal Opportunity

The selected consultant shall provide equal opportunity in employment and shall not discriminate against any employee, applicant for employment, subcontractor, or other

person on the basis of any classification protected by applicable federal, state, or local law.

The consultant shall take affirmative steps, as required by applicable law, to ensure that qualified individuals are considered for employment and professional opportunities without unlawful discrimination.

Non-Discrimination

The selected consultant shall not discriminate in the recruitment, hiring, assignment, promotion, compensation, retention, or termination of employees, or in the selection and utilization of subcontractors, on the basis of any legally protected characteristic, including, but not limited to:

- Race;
- Color;
- Religion;
- Sex;
- Sexual orientation;
- Gender identity or expression;
- National origin;
- Ancestry;
- Age;
- Disability;
- Veteran status; or
- Any other classification protected by applicable federal, state, or local law.

Compliance with Applicable Laws

The selected consultant shall comply with all applicable equal employment opportunity and non-discrimination requirements, including applicable provisions of federal and Pennsylvania law and any applicable Middletown Township ordinances, policies, or regulations.

Nothing in this section shall be construed to require the consultant to take any action prohibited by applicable law.

Subcontractors and Subconsultants

The selected consultant shall require all approved subcontractors and subconsultants performing services under the resulting Professional Services Agreement to comply with applicable equal opportunity and non-discrimination requirements.

The consultant shall remain responsible for ensuring that its approved subcontractors and subconsultants comply with the requirements of this section.

Certification

As part of its proposal, each proposer shall certify that it is in compliance with applicable equal opportunity and non-discrimination laws and that it will comply with the requirements of this section if selected for the project.

The Township may require the selected consultant to execute additional equal opportunity or non-discrimination certifications or acknowledgments as may be required by applicable law or Township policy.

Enforcement

A material violation of applicable equal opportunity or non-discrimination requirements may constitute grounds for rejection of a proposal, termination of the resulting Professional Services Agreement, or such other remedies as may be available to the Township under the contract or applicable law.

SECTION 10. CONFLICT OF INTEREST

Middletown Township is seeking an independent and objective evaluation of the future operation and management of Middletown Country Club. Because the study may result in recommendations concerning the selection of a future management company, operating structure, vendors, capital investments, or other business relationships, it is essential that the selected consultant be free from actual, potential, or perceived conflicts of interest.

Disclosure Requirement

Each proposer shall disclose, as part of its proposal, any actual, potential, or perceived conflict of interest that could affect, or reasonably appear to affect, the proposer's ability to provide independent and objective professional services to the Township.

The disclosure shall include any current or recent financial, professional, contractual, ownership, employment, or other relationship involving the proposer, its principals, key

personnel, or proposed subconsultants with any party that may have an interest in the outcome of this study.

Relationships Requiring Disclosure

Without limiting the general disclosure requirement above, proposers shall disclose relationships with:

- Middletown Township;
- Middletown Country Club;
- The current management company or its affiliates;
- Current or former employees, officers, owners, or principals of the current management company;
- Golf course management companies or potential future operators;
- Golf course architects or contractors;
- Golf course maintenance companies;
- Food and beverage or hospitality management companies;
- Banquet, event, or catering operators;
- Golf equipment, technology, or service vendors;
- Financial institutions or investment entities that may have an interest in the future operation or capital investment of the Country Club;
- Any other individual, company, organization, or entity that could reasonably benefit financially or otherwise from the recommendations resulting from the study.

The disclosure requirement applies to the proposer and to all proposed subconsultants and key project personnel.

Independence of Recommendations

The selected consultant shall provide recommendations based solely upon its professional analysis, the information available to it, applicable market conditions, community input, and the objectives established by the Township.

The consultant shall not recommend or favor a particular management company, vendor, contractor, operating structure, investment, or other business arrangement based upon an undisclosed financial or professional relationship.

Where a potential conflict exists but the Township determines that the relationship does not prevent the consultant from performing the work, the consultant shall fully disclose the relationship and comply with any mitigation measures required by the Township.

Current Management Company

Because the study will evaluate the future management and operation of Middletown Country Club, any proposer that has a current or recent business relationship with the existing management company shall fully disclose the nature, duration, and financial significance of that relationship.

The Township reserves the right to determine whether such a relationship creates an actual, potential, or perceived conflict of interest.

A prior relationship with the current management company shall not automatically disqualify a proposer; however, the Township may consider the nature of the relationship when evaluating the proposer's ability to provide independent recommendations.

Future Business Relationships

The selected consultant shall not use information obtained through this engagement to obtain an unfair competitive advantage in connection with any future management, operating, construction, consulting, or vendor opportunity involving Middletown Country Club.

Unless otherwise authorized in writing by the Township, the consultant shall not participate in or assist a potential future operator or vendor in competing for a contract that directly results from recommendations or procurement opportunities developed through this study.

This provision is intended to preserve the integrity of the Township's future procurement processes and shall not prohibit legitimate professional services unrelated to this project.

Ongoing Disclosure

The obligation to disclose conflicts of interest shall continue throughout the term of the resulting Professional Services Agreement.

If an actual, potential, or perceived conflict arises after the contract has been executed, the consultant shall promptly notify the Township in writing and provide sufficient information for the Township to evaluate the circumstances.

The Township may require the consultant to implement reasonable measures to mitigate the conflict or, where appropriate, remove affected personnel, utilize an independent subconsultant, or take other corrective action.

Township Determination

The Township shall have the right to determine whether a disclosed relationship constitutes an actual, potential, or perceived conflict of interest that would affect the proposer's eligibility or ability to perform the services.

The Township may consider the nature of the relationship, the individuals involved, the scope of the relationship, the potential financial interest, and whether adequate measures exist to protect the independence and integrity of the study.

The Township's determination shall be made in accordance with applicable law and the Township's procurement policies.

Certification

Each proposer shall include a signed statement certifying that, except as specifically disclosed in its proposal:

1. The proposer has no actual, potential, or perceived conflict of interest that would prevent it from providing independent and objective services to the Township;
2. The proposer has disclosed all relationships that could reasonably be perceived as creating a conflict;
3. The proposer will promptly disclose any conflict that arises during the course of the project; and
4. The proposer will cooperate with the Township in addressing any conflict identified during the procurement process or the performance of the contract.

Failure to disclose a material conflict of interest may result in rejection of the proposal, disqualification from consideration, termination of the resulting agreement, or any other remedy available to the Township under the contract or applicable law.

SECTION 11. PENNSYLVANIA RIGHT-TO-KNOW LAW

Middletown Township is a Pennsylvania local agency subject to the Pennsylvania Right-to-Know Law, 65 P.S. §§ 67.101–67.3104 (the "Right-to-Know Law" or "RTKL"). Proposers should be aware that proposals and other materials submitted to the Township in connection with this Request for Proposals may constitute public records and may be subject to disclosure in accordance with the RTKL and other applicable law.

Public Records

All proposals, submissions, correspondence, reports, and other records submitted to or maintained by the Township in connection with this procurement shall be handled in accordance with the RTKL and other applicable Pennsylvania law.

The Township cannot guarantee that any particular portion of a proposal will remain confidential or be exempt from disclosure.

Confidential or Proprietary Information

If a proposer believes that any portion of its proposal contains information that is exempt from public disclosure under the RTKL, including confidential proprietary information or trade secrets, the proposer shall clearly and conspicuously identify the specific information it believes is protected.

A proposer claiming that information is exempt from disclosure should:

1. Clearly mark the specific pages, sections, tables, or other portions of the proposal claimed to be exempt;
2. Identify the applicable exemption or legal basis for the claim; and
3. Provide a written explanation supporting the claim.

General or blanket statements that the entire proposal, or substantial portions of the proposal, are confidential or proprietary will not be sufficient.

Township Determination

The Township shall determine whether a record or portion of a record is subject to disclosure in accordance with the RTKL and other applicable law.

The Township shall not be responsible for maintaining the confidentiality of information that is required to be disclosed by law.

If the Township receives a Right-to-Know request seeking records that may contain information identified by a proposer as confidential, proprietary, or otherwise exempt, the Township will handle the request in accordance with the procedures and deadlines established by the RTKL.

The Township may provide notice to the affected proposer when required by law.

Proposer Responsibility

Each proposer is responsible for reviewing its proposal before submission and determining what information, if any, it believes should be identified as confidential, proprietary, or exempt from disclosure.

The proposer acknowledges that marking information as "confidential," "proprietary," or "trade secret" does not, by itself, make the information exempt from disclosure under the RTKL.

The proposer shall be responsible for providing sufficient information to support any claim that particular information is exempt from disclosure.

Public Nature of Procurement

Proposers should recognize that this procurement is being conducted by a Pennsylvania municipal government and that records associated with the procurement may be subject to public inspection and disclosure.

Accordingly, proposers are encouraged to avoid including unnecessary confidential, proprietary, personal, or sensitive information in their proposals.

No Waiver of Statutory Rights

Nothing contained in this Request for Proposals shall be interpreted as limiting, expanding, or waiving any rights or obligations of the Township or a requester under the Pennsylvania Right-to-Know Law.

In the event of a conflict between this section and applicable law, the applicable law shall control.

SECTION 12. DELIVERABLES

The selected consultant shall provide the Township with clear, professional, and actionable deliverables throughout the course of the Middletown Country Club Feasibility Study. Deliverables shall be prepared in a format suitable for review by Township staff, the Parks and Recreation Board, the Board of Supervisors, and the public.

The consultant shall coordinate the timing and content of deliverables with the Township throughout the study and shall make reasonable revisions based upon Township feedback.

Project Kick-Off and Work Plan

Following execution of the Professional Services Agreement, the consultant shall participate in a project kick-off meeting with Township representatives.

The consultant shall provide a written project work plan that identifies:

- Major tasks and subtasks;
- Project milestones;
- Anticipated schedule;
- Information and documentation required from the Township;
- Proposed stakeholder and community engagement activities;
- Meetings and presentations;
- Anticipated interim deliverables; and
- Final report schedule.

The work plan shall be reviewed and approved by the Township prior to commencement of substantive study activities.

Existing Conditions and Baseline Assessment

The consultant shall prepare an assessment of the current condition and performance of Middletown Country Club.

The assessment shall, to the extent applicable, include:

- Golf course operations;
- Golf course condition and infrastructure;
- Maintenance operations and equipment;
- Clubhouse facilities;
- Restaurant and food and beverage operations;
- Banquet and event facilities;
- Golf shop;
- Former swimming pool and related facilities;
- Parking and supporting infrastructure;
- Staffing and organizational structure;
- Existing management and operating agreements;
- Current revenue sources;
- Current operating expenses;
- Historical financial performance;

- Current capital needs;
- Existing deferred maintenance;
- Existing debt or other financial obligations, if applicable; and
- Other material assets, liabilities, or operational considerations.

The consultant shall identify strengths, weaknesses, opportunities, and challenges affecting the current operation.

Market and Competitive Analysis

The consultant shall prepare a market analysis evaluating the competitive environment in which Middletown Country Club operates.

The analysis should consider, as appropriate:

- Local and regional golf market conditions;
- Comparable public and private golf facilities;
- Golf participation trends;
- Green fee and membership pricing;
- Tournament and outing opportunities;
- Food and beverage operations;
- Banquet and event markets;
- Wedding and private event markets;
- Junior and youth golf opportunities;
- Other recreational and community programming;
- Demographic and population trends;
- Potential customer markets; and
- Opportunities for increased utilization and revenue.

The consultant shall identify opportunities for Middletown Country Club to improve its competitive position and strengthen its role as a community destination.

Financial Analysis

The consultant shall prepare a comprehensive financial analysis of the Country Club.

The analysis shall include, at a minimum:

- Historical financial performance;
- Current operating revenues and expenses;
- Revenue by major operating category, where data is available;

- Operating margins;
- Staffing and personnel costs;
- Maintenance and operating costs;
- Golf-related revenues and expenses;
- Food and beverage revenues and expenses;
- Banquet and event revenues and expenses;
- Other significant revenue sources and expenses;
- Capital expenditures;
- Deferred maintenance;
- Major repair and replacement requirements;
- Potential sources of additional revenue;
- Opportunities for cost reduction or operational efficiencies; and
- Potential financial contribution to the Township.

The consultant shall develop financial projections for the recommended operating model and shall clearly identify the assumptions underlying those projections.

Operating Model Analysis

The consultant shall evaluate the principal alternatives available to the Township for the future operation of Middletown Country Club.

At a minimum, the analysis shall consider:

1. **Continued Private Management** through a new competitive procurement process;
2. **Township Operation** through direct municipal management; and
3. **Alternative Public-Private Operating Models**, where appropriate.

For each alternative, the consultant shall evaluate:

- Organizational structure;
- Staffing requirements;
- Management responsibilities;
- Operational requirements;
- Financial performance;
- Revenue potential;
- Capital responsibilities;
- Risk allocation;

- Township oversight;
- Community benefits;
- Advantages and disadvantages;
- Implementation requirements; and
- Long-term sustainability.

The consultant shall provide a comparative analysis and identify the strengths, weaknesses, risks, and opportunities associated with each model.

Capital Needs and Investment Plan

The consultant shall prepare a comprehensive assessment of current and anticipated capital needs.

The assessment shall address, as applicable:

- Golf course infrastructure;
- Greens, tees, bunkers, and fairways;
- Irrigation and drainage;
- Maintenance facilities;
- Maintenance equipment;
- Clubhouse facilities;
- Roof, mechanical, electrical, plumbing, and building systems;
- Restaurant and kitchen facilities;
- Banquet and event spaces;
- Parking and site improvements;
- Landscaping and site infrastructure;
- Former swimming pool facilities;
- Accessibility improvements;
- Technology and point-of-sale systems; and
- Other major capital assets.

The consultant shall identify the estimated timing, priority, and anticipated cost of significant capital improvements.

The consultant shall distinguish between:

- Immediate needs;
- Short-term needs;
- Medium-term needs; and

- Long-term needs.

The consultant shall develop a recommended capital improvement plan that identifies potential funding sources and the anticipated responsibility for funding each improvement under the various operating models.

Former Pool Assessment

The consultant shall specifically evaluate the former swimming pool facility, which has been closed and unused for several years.

The assessment shall address to the extent feasible:

- Existing physical condition;
- Estimated cost of rehabilitation;
- Estimated cost of removal or demolition;
- Review of liability.
- Potential operational and maintenance costs;
- Potential recreational or community uses;
- Revenue-generating opportunities, if any;
- Benefits to the Country Club and Township;
- Regulatory or permitting considerations; and
- Recommended course of action.

The consultant shall provide the Township with a clear recommendation regarding the future of the former pool area.

Banquet and Event Facility Assessment

The consultant shall evaluate the current and potential future use of the Country Club's banquet and event facilities.

The assessment shall consider:

- Current utilization;
- Revenue and expense performance;
- Market demand;
- Competitive facilities;
- Wedding and private event opportunities;
- Community events;
- Food and beverage operations;

- Staffing requirements;
- Facility improvements;
- Marketing opportunities; and
- Potential for increased utilization and revenue.

The consultant shall identify opportunities to better position the banquet and event facilities as both a community asset and a financially sustainable component of the Country Club.

Community Engagement Deliverables

The consultant shall conduct the community engagement activities identified in the Scope of Services.

Community engagement deliverables shall include:

- Public input opportunities;
- Stakeholder interviews or meetings;
- Presentation materials;
- Surveys or other public input tools, if utilized;
- Summary of community feedback;
- Identification of recurring themes and concerns; and
- Explanation of how public input was considered in the consultant's recommendations.

The consultant shall present findings and preliminary recommendations to the Parks and Recreation Board and the Board of Supervisors at appropriate stages of the study.

Interim Findings Presentation

The consultant shall prepare an interim findings presentation for Township staff, the Parks and Recreation Board, and/or the Board of Supervisors.

The presentation shall summarize:

- Existing conditions;
- Preliminary financial findings;
- Market analysis;
- Capital needs;
- Operating model alternatives;
- Community input received; and

- Preliminary observations and opportunities.

The Township may provide comments and direction following the presentation. The consultant shall consider such comments in preparing the final study.

Draft Feasibility Study

The consultant shall prepare a draft comprehensive feasibility study for review by Township staff.

The draft report shall include, at a minimum:

1. Executive Summary;
2. Existing Conditions Assessment;
3. Market and Competitive Analysis;
4. Operational Assessment;
5. Financial Analysis;
6. Operating Model Alternatives;
7. Capital Needs Assessment;
8. Banquet and Event Facility Assessment;
9. Former Pool Assessment;
10. Community Engagement Findings;
11. Risk and Opportunity Analysis;
12. Comparative Evaluation of Operating Alternatives;
13. Recommended Operating Model;
14. Recommended Capital Improvement Strategy;
15. Financial Sustainability Plan;
16. Implementation Plan; and
17. Appendices and supporting documentation.

Final Feasibility Study

Following review of the draft report and receipt of Township comments, the consultant shall prepare a final Middletown Country Club Feasibility Study.

The final report shall provide a clear, concise, and actionable recommendation regarding the future operation and management of the Country Club.

The final report shall identify:

- The recommended operating model;
- The rationale supporting the recommendation;
- Expected financial performance;
- Required investments;
- Capital funding needs;
- Operational changes;
- Staffing requirements;
- Revenue opportunities;
- Community benefits;
- Key risks;
- Implementation requirements;
- Recommended timeline; and
- Specific next steps for the Township.

The final report shall distinguish between recommendations that should be implemented immediately and those that should be implemented over the longer term.

Board of Supervisors Presentation

The consultant shall provide a final presentation to the Middletown Township Board of Supervisors summarizing the findings and recommendations of the study.

The presentation shall be suitable for a public meeting and shall clearly communicate the financial, operational, capital, and community implications of the recommended course of action.

The consultant shall be prepared to answer questions from the Board of Supervisors, Township staff, and members of the public.

Parks and Recreation Board Presentation

The consultant shall provide a presentation to the Middletown Township Parks and Recreation Board addressing the findings and recommendations of the study.

The presentation shall provide an opportunity for the Board to review the study from a recreational, community, and public-benefit perspective.

Electronic and Printed Deliverables

Unless otherwise directed by the Township, the consultant shall provide all final deliverables in electronic format.

The final report shall be provided in:

- Searchable PDF format; and
- An editable electronic format reasonably compatible with commonly used Township software.

Financial models, spreadsheets, schedules, and other supporting analytical materials shall be provided in an editable electronic format.

The consultant shall provide presentation materials in an editable format where reasonably practicable.

The Township may request a reasonable number of printed copies of the final report for use by Township officials and public meetings.

Supporting Data and Work Product

The consultant shall provide the Township with copies of supporting data, financial models, calculations, assumptions, schedules, maps, charts, and other materials developed specifically for the project, subject to applicable proprietary rights and the terms of the Professional Services Agreement.

Financial projections shall be provided in sufficient detail to allow Township staff and its advisors to understand the assumptions and methodology used to develop the projections.

Implementation Roadmap

As a final component of the study, the consultant shall provide an implementation roadmap identifying the recommended actions necessary to move from the current operating structure to the recommended future operating model.

The roadmap shall identify, as appropriate:

- Immediate actions;
- Actions within the first year;
- Actions within years two through five;
- Longer-term actions;
- Responsible parties;
- Anticipated costs;
- Required decisions or approvals;
- Potential procurement requirements;
- Capital investments;
- Contractual considerations; and
- Key milestones.

The implementation roadmap shall be practical and designed to assist the Township in moving from study and evaluation to action.

Deliverable Review and Revisions

The Township shall have an opportunity to review draft deliverables and provide comments to the consultant.

The consultant shall incorporate reasonable Township comments and corrections into the final deliverables without additional compensation, provided such revisions are consistent with the approved scope of services.

Any material expansion of the scope of services requested by the Township shall be addressed through the change-order or contract-amendment process established in the Professional Services Agreement.

SECTION 13. TENTATIVE PROCUREMENT AND PROJECT SCHEDULE

The following schedule represents the Township's anticipated timeline for the procurement and completion of the Middletown Country Club Feasibility Study. The Township reserves the right to modify the schedule, extend deadlines, or establish additional dates as necessary. Any material changes to the procurement schedule will be communicated to proposers in accordance with the requirements of this Request for Proposals.

Milestone	Tentative Date
Request for Proposals Issued	
Deadline for Submission of Written Questions	
Township Response to Questions / Addendum Issued	
Optional / Mandatory Site Visit	
Proposal Submission Deadline	
Proposal Review and Evaluation	
Consultant Interviews / Presentations, if required	
Selection of Preferred Consultant	
Township Board of Supervisors Authorization to Negotiate / Award	
Contract Negotiations	
Professional Services Agreement Executed	
Notice to Proceed	
Project Kick-Off Meeting	
Consultant Work Plan Due	
Existing Conditions / Baseline Assessment	
Market and Competitive Analysis	
Financial and Operational Analysis	
Capital Needs Assessment	
Banquet / Event Facility Assessment	
Former Pool Assessment	
Initial Community Engagement / Public Input	

Milestone

Tentative Date

Presentation to Parks and Recreation Board – Preliminary Findings

Interim Findings Presentation to Board of Supervisors

Draft Feasibility Study Submitted

Township Review of Draft Study

Final Community Engagement / Public Input

Final Feasibility Study Submitted

Presentation to Parks and Recreation Board – Final Recommendations

Presentation to Board of Supervisors – Final Recommendations

Project Completion

Anticipated Project Duration

The Township anticipates that the study will be completed within approximately _____ months following issuance of the Notice to Proceed.

Proposers shall provide a proposed project schedule as part of their proposal and shall identify the anticipated duration of each major phase of the work.

The Township recognizes that certain project activities may occur concurrently. Proposers are encouraged to develop a schedule that is efficient while allowing sufficient time for data collection, financial analysis, facility assessment, community engagement, Township review, and preparation of the final recommendations.

Proposed Consultant Schedule

Each proposer shall include a detailed project schedule identifying the anticipated timing of the major tasks and deliverables described in the Scope of Services.

At a minimum, the proposed schedule shall identify:

- Project initiation and kick-off;
- Data collection and document review;
- Site inspections;

- Existing conditions assessment;
- Market analysis;
- Financial analysis;
- Operating model evaluation;
- Capital needs assessment;
- Banquet and event facility assessment;
- Former pool assessment;
- Community engagement activities;
- Parks and Recreation Board presentations;
- Board of Supervisors presentations;
- Draft report;
- Township review period;
- Final report; and
- Final presentation and project completion.

The selected consultant's final project schedule shall be established in coordination with the Township following contract execution.

Schedule Adjustments

The Township and selected consultant may mutually agree to reasonable adjustments to the project schedule based upon the availability of information, public meeting schedules, community engagement requirements, seasonal considerations, or other circumstances affecting the project.

The consultant shall promptly notify the Township of any circumstance that may materially affect the agreed-upon schedule and shall recommend appropriate corrective measures.

Seasonal Considerations

Because the Middletown Country Club is an active golf and recreational facility, proposers should consider seasonal operating conditions when developing their proposed schedule.

The consultant should identify any inspections, observations, market research, or other work that would benefit from being conducted during particular times of the golf season, banquet season, or other periods of facility operation.

The proposer shall explain any significant seasonal considerations that affect its proposed schedule.

SECTION 14. REQUIRED FORMS AND CERTIFICATIONS

Each proposer shall complete and submit all forms and certifications identified in this section as part of its proposal. Forms shall be completed in their entirety and signed by an authorized representative of the proposer.

Failure to submit a required form or certification may result in the proposal being deemed non-responsive, subject to the Township's right to waive minor informalities or request clarification.

Unless otherwise specified, the forms included in the appendices to this Request for Proposals shall be used by each proposer.

Required Forms

Each proposal shall include the following:

1. Proposal Submission Form

The Proposal Submission Form shall identify the proposer and include:

- Legal name of the firm;
- Business address;
- Mailing address, if different;
- Telephone number;
- Email address;
- Primary contact person;
- Name and title of authorized representative;
- Pennsylvania business registration information, if applicable; and
- Signature of an authorized representative.

The signature shall certify that the proposer has reviewed the RFP and agrees to comply with its requirements.

2. Proposal Certification

The proposer shall certify that:

- The information contained in the proposal is true and accurate to the best of its knowledge;
- The proposer has reviewed and understands the requirements of the RFP;

- The proposer has the qualifications and resources necessary to perform the work;
- The proposal shall remain valid for ninety (90) days following the submission deadline; and
- The proposer understands that submission of a proposal does not guarantee an award of a contract.

3. Addenda Acknowledgment Form

Each proposer shall acknowledge receipt of all addenda issued by the Township prior to the proposal submission deadline.

The form shall identify the addendum number and date for each addendum received.

Failure to acknowledge an addendum may result in rejection of the proposal if the Township determines that the addendum materially affected the requirements of the RFP.

4. Conflict of Interest Disclosure and Certification

Each proposer shall complete the Conflict of Interest Disclosure and Certification required under Section 9 of this RFP.

The proposer shall disclose any actual, potential, or perceived conflict of interest involving the proposer, its principals, employees, proposed project team members, or subconsultants.

If no conflict exists, the proposer shall affirmatively state that no conflict exists.

5. Responsible Contractor Certification

Each proposer shall complete the Responsible Contractor Certification required under Section 7.

The certification shall confirm that the proposer meets the responsibility requirements established by the Township and is legally and professionally qualified to perform the services.

6. Equal Opportunity / Non-Discrimination Certification

Each proposer shall certify compliance with the Equal Opportunity / Non-Discrimination requirements contained in Section 8 of this RFP.

7. References Form

Each proposer shall provide a minimum of three (3) professional references for projects of similar size, scope, or complexity.

At least one reference should, where possible, involve a municipal, governmental, or other public-sector client.

Each reference shall include:

- Client name;
- Contact person;
- Title;
- Telephone number;
- Email address;
- Description of services provided;
- Approximate project value;
- Date or period of performance; and
- Brief description of the project's relevance to this RFP.

The Township reserves the right to contact references and other individuals or organizations regarding the proposer's qualifications and past performance.

8. Proposed Project Team Form

The proposer shall identify the individuals who will be responsible for performing the work.

The form shall identify:

- Project manager;
- Key professional staff;
- Financial analysts;
- Golf operations specialists;
- Facility or capital planning specialists;
- Community engagement personnel;
- Proposed subconsultants; and
- Other key personnel.

The proposer shall identify each individual's role, qualifications, relevant experience, and anticipated level of involvement.

9. Fee Proposal Form

Each proposer shall submit a detailed fee proposal using the form provided by the Township.

At a minimum, the fee proposal shall identify:

- Total proposed project fee;
- Fees by major task or phase;
- Anticipated reimbursable expenses;
- Hourly rates for key personnel, if applicable;
- Subconsultant costs, if applicable;
- Additional services rates, if applicable; and
- Any assumptions or exclusions affecting the proposed fee.

The Township reserves the right to negotiate the final scope and fee with the selected consultant.

10. Exceptions to RFP Requirements

Each proposer shall identify any requested exceptions, exclusions, qualifications, or proposed modifications to the requirements of this RFP.

Exceptions shall be clearly identified and shall include:

- The specific section or provision to which the exception applies;
- The proposed modification; and
- The reason for the requested exception.

A proposer shall not assume that an exception has been accepted merely because it is included in the proposal. Any exception must be expressly accepted by the Township.

11. Insurance Certification

The selected consultant shall provide the insurance documentation required by Section 6 prior to execution of the Professional Services Agreement.

Proposers shall identify within their proposal any inability or anticipated difficulty in meeting the insurance requirements established by the Township.

12. Litigation and Claims Disclosure

Each proposer shall disclose any material litigation, arbitration, professional liability claim, contract dispute, or governmental investigation involving the firm or its principals that relates to the performance of professional services during the previous five (5) years.

The disclosure shall briefly describe the matter and its current status.

13. Debarment and Suspension Certification

Each proposer shall certify that the firm is not currently suspended, debarred, or otherwise prohibited from contracting with the federal government, the Commonwealth of Pennsylvania, or any political subdivision or public agency, except as specifically disclosed in the proposal.

14. Non-Collusion Certification

- Each proposer shall certify that:
- The proposal has been prepared independently;
- The proposer has not entered into any agreement or understanding with another proposer concerning the proposal or proposed pricing;
- The proposer has not engaged in any collusive or anticompetitive conduct in connection with this procurement; and
- No attempt has been made to improperly influence the procurement process.

15. Pennsylvania Right-to-Know Designation

If applicable, the proposer shall identify any portions of its proposal that it believes contain confidential proprietary information, trade secrets, or other information exempt from disclosure under the Pennsylvania Right-to-Know Law.

Any such designation shall comply with the requirements of Section 10 of this RFP.

Blanket designations of an entire proposal as confidential or proprietary shall not be accepted as sufficient identification of exempt information.

Form of Signature

All required forms shall be signed by an individual authorized to legally bind the proposer.

Electronic signatures may be accepted at the Township's discretion, subject to applicable law and Township policy.

Completeness of Submission

Proposers are responsible for ensuring that all required forms, certifications, schedules, and supporting documentation are included with their proposals.

The Township reserves the right to request clarification or supplementation of a proposal when permitted by applicable law and Township procurement procedures.

The Township also reserves the right to waive minor informalities or irregularities that do not materially affect the substance of a proposal.

Appendix of Required Forms

The Township intends to provide the following forms as appendices to this Request for Proposals:

Appendix A – Proposal Submission Form

Appendix B – Proposal Certification

Appendix C – Addenda Acknowledgment Form

Appendix D – Conflict of Interest Disclosure and Certification

Appendix E – Responsible Contractor Certification

Appendix F – Equal Opportunity / Non-Discrimination Certification

Appendix G – Professional References Form

Appendix H – Proposed Project Team Form

Appendix I – Fee Proposal Form

Appendix J – Exceptions to RFP Requirements Form

Appendix K – Litigation and Claims Disclosure

Appendix L – Debarment and Suspension Certification

Appendix M – Non-Collusion Certification

Appendix N – Right-to-Know Confidentiality Designation Form

APPENDICES AND REQUIRED FORMS

Middletown Township – Middletown Country Club Feasibility Study Request for Proposals

The following forms shall be completed and submitted as part of the Proposer's response to the Request for Proposals. Each form should be completed in full and signed by an authorized representative where indicated.

Proposer: _____

Date: _____

APPENDIX A – PROPOSAL SUBMISSION FORM

1. Proposer Information

Item	Response
Legal Name of Firm	
Doing Business As (if applicable)	
Street Address	
City / State / ZIP	
Primary Contact	
Telephone	
Email	
Website	
Pennsylvania Business Registration No. (if applicable)	

2. Authorized Representative

The undersigned represents that he/she is authorized to submit this proposal on behalf of the Proposer.

Authorized Representative	
Title	
Telephone	
Email	
Signature	
Date	

3. Proposal

The Proposer hereby submits its proposal to provide professional consulting services for the Middletown Country Club Feasibility Study in accordance with the Township's Request for Proposals.

The Proposer acknowledges that the Township reserves the rights stated in the RFP, including the right to reject any or all proposals, negotiate with a selected proposer, and make no award.

APPENDIX B – PROPOSAL CERTIFICATION

The undersigned certifies, on behalf of the Proposer, that:

The information contained in the proposal is true and accurate to the best of the Proposer's knowledge.

The Proposer has reviewed the entire RFP and understands the requirements, scope, schedule, and conditions contained therein.

The Proposer possesses the experience, qualifications, personnel, financial capacity, and other resources necessary to perform the services.

The proposal shall remain valid for ninety (90) days following the proposal submission deadline, unless otherwise agreed by the Township.

The Proposer understands that submission of a proposal does not guarantee an award or contract.

The Proposer agrees to comply with applicable laws, ordinances, regulations, and Township requirements applicable to the services.

Authorized Representative	
Title	
Firm	
Signature	
Date	

APPENDIX C – ADDENDA ACKNOWLEDGMENT FORM

The Proposer acknowledges receipt of the following addenda issued by Middletown Township:

Addendum No.	Date Issued	Received / Acknowledged
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No
		☐ Yes ☐ No

If no addenda were issued or received, check here: ☐ No addenda received.

Authorized Representative	
Signature	
Date	

APPENDIX D – CONFLICT OF INTEREST DISCLOSURE AND CERTIFICATION

The Proposer shall disclose any actual, potential, or perceived conflict of interest involving the Proposer, its principals, employees, proposed project team members, or subconsultants.

Disclosure

Does the Proposer have any actual, potential, or perceived conflict of interest related to this RFP?	☐ Yes ☐ No
If yes, identify the person/entity and describe the relationship:	
Does the Proposer have any current or recent relationship with the current Country Club management company?	☐ Yes ☐ No
If yes, describe the relationship, dates, and nature of services:	
Does the Proposer or any key team member anticipate pursuing a future management, operating, vendor, or other contract arising from this study?	☐ Yes ☐ No
If yes, describe:	

Attach additional pages if necessary.

Certification

Except as disclosed above, the undersigned certifies that the Proposer has no actual conflict of interest that would prevent it from providing independent and objective services to Middletown Township. The Proposer agrees to promptly disclose any conflict that arises during the project.

Authorized Representative	
---------------------------	--

Title	
Firm	
Signature	
Date	

APPENDIX E – RESPONSIBLE CONTRACTOR CERTIFICATION

The undersigned certifies that the Proposer:

Is legally authorized to conduct business and provide the proposed professional services.

Has the experience and professional qualifications necessary to perform the work described in the RFP.

Has sufficient qualified personnel and resources to complete the project within the proposed schedule.

Has the financial and organizational capacity to perform the services.

Has disclosed any material litigation, claims, investigations, or contract disputes as required by the RFP.

Is not aware of any circumstance that would prevent it from satisfactorily performing the services.

Will comply with applicable laws, regulations, licensing requirements, and professional standards.

The Proposer understands that the Township may verify information provided in this certification.

Authorized Representative	
Title	
Firm	
Signature	
Date	

APPENDIX F – EQUAL OPPORTUNITY / NON-DISCRIMINATION CERTIFICATION

The Proposer certifies that it will comply with applicable federal, Commonwealth of Pennsylvania, and local equal opportunity and non-discrimination requirements.

The Proposer shall not unlawfully discriminate in employment or in the performance of services on the basis of any characteristic protected by applicable law.

The Proposer further certifies that it will require approved subcontractors and subconsultants performing services under the resulting agreement to comply with applicable equal opportunity and non-discrimination requirements.

Authorized Representative	
Title	
Firm	
Signature	
Date	

APPENDIX G – PROFESSIONAL REFERENCES FORM

Provide at least three (3) professional references for projects of similar size, scope, or complexity. At least one reference should, where possible, involve a municipal, governmental, or other public-sector client.

Reference 1

Client / Organization	
Contact Person / Title	
Address	
Telephone	
Email	
Project Name / Description	
Services Provided	
Approximate Project Value	
Dates of Performance	
Why this project is relevant to this RFP	

Reference 2

Client / Organization	
Contact Person / Title	
Address	
Telephone	
Email	
Project Name / Description	
Services Provided	

Approximate Project Value	
Dates of Performance	
Why this project is relevant to this RFP	

Reference 3

Client / Organization	
Contact Person / Title	
Address	
Telephone	
Email	
Project Name / Description	
Services Provided	
Approximate Project Value	
Dates of Performance	
Why this project is relevant to this RFP	

APPENDIX H – PROPOSED PROJECT TEAM FORM

Identify the individuals who will perform key roles on the project. Attach resumes as requested by the RFP.

Name	Firm	Role	Years of Relevant Experience	% / Hours of Involvement

Key Personnel Qualifications

For each key team member, briefly describe relevant experience with municipal feasibility studies, golf operations, financial analysis, capital planning, facility assessment, community engagement, or related services.

Team Member	Relevant Experience / Qualifications

Subconsultants

Subconsultant	Specialty / Role	Relevant Experience

APPENDIX I – FEE PROPOSAL FORM

Provide a lump-sum fee for the base scope of services and identify the fee associated with each major task. Any assumptions, exclusions, or proposed additional services must be clearly identified.

Task / Phase	Proposed Fee
Project Initiation / Work Plan	\$
Existing Conditions / Baseline Assessment	\$
Market and Competitive Analysis	\$
Financial Analysis	\$
Operating Model Analysis	\$
Capital Needs / Investment Plan	\$
Former Pool Assessment	\$
Banquet / Event Facility Assessment	\$
Community Engagement	\$
Interim Findings / Board Presentations	\$
Draft Feasibility Study	\$
Final Feasibility Study / Final Presentations	\$
Implementation Roadmap	\$
TOTAL BASE FEE	\$

Additional Services / Hourly Rates

Personnel Classification	Hourly Rate
Principal / Project Director	\$
Project Manager	\$
Financial Analyst	\$

Golf Operations Specialist	\$
Capital / Facilities Specialist	\$
Community Engagement Specialist	\$
Other: _____	\$

Reimbursable Expenses

Expense Category	Rate / Basis
Travel / Mileage	
Printing / Reproduction	
Other	

Fee assumptions, exclusions, or conditions:

—

—

Authorized Representative	
Signature	
Date	

APPENDIX J – EXCEPTIONS TO RFP REQUIREMENTS FORM

Identify any requested exception, exclusion, qualification, or modification to the requirements of the RFP. If none, check the box below.

- ☐ No exceptions, exclusions, qualifications, or requested modifications.

RFP Section / Requirement	Proposed Exception or Modification	Reason

The Proposer understands that an exception is not accepted unless expressly agreed to by the Township.

Authorized Representative	
Signature	
Date	

APPENDIX K – LITIGATION AND CLAIMS DISCLOSURE

Disclose any material litigation, arbitration, professional liability claim, contract dispute, governmental investigation, or similar matter involving the Proposer or its principals during the previous five (5) years that relates to the performance of professional services.

- ☐ No such matters exist.
- ☐ The following matters exist:

Matter / Case	Parties	Date / Status	Nature of Matter	Disposition / Current Status

Attach additional pages if necessary.

Authorized Representative	
Signature	
Date	

APPENDIX L – DEBARMENT AND SUSPENSION CERTIFICATION

The Proposer certifies that it is not currently suspended, debarred, proposed for debarment, or otherwise prohibited from contracting with the federal government, the Commonwealth of Pennsylvania, or any political subdivision or public agency, except as disclosed below.

- ☐ The Proposer is not currently suspended, debarred, proposed for debarment, or otherwise prohibited from contracting with a public agency.
- ☐ The Proposer is subject to the following suspension, debarment, proposed debarment, or other restriction:

Authorized Representative	
Title	
Firm	
Signature	
Date	

APPENDIX M – NON-COLLUSION CERTIFICATION

The undersigned certifies, on behalf of the Proposer, that:

The proposal has been prepared independently and without consultation, communication, or agreement with another proposer concerning the proposal, price, terms, or conditions, except as permitted for legitimate subcontracting or teaming arrangements disclosed in the proposal.

The Proposer has not engaged in collusive, fraudulent, or anticompetitive conduct in connection with this procurement.

No attempt has been made to induce another person or firm to refrain from submitting a proposal.

No payment, gift, promise, or other inducement has been offered or made for the purpose of influencing another person or firm in connection with this procurement.

The Proposer has not improperly communicated with Township officials or employees concerning the procurement in violation of the RFP or applicable law.

Authorized Representative	
Title	
Firm	
Signature	
Date	

APPENDIX N – RIGHT-TO-KNOW CONFIDENTIALITY DESIGNATION FORM

Middletown Township is subject to the Pennsylvania Right-to-Know Law. Proposers should not assume that proposal materials are confidential. If the Proposer believes specific information is exempt from disclosure, the Proposer must identify the specific information and provide the legal basis for the claim.

- The Proposer is not claiming that any portion of its proposal is confidential, proprietary, a trade secret, or otherwise exempt from disclosure.
- The Proposer is claiming that the following specific information is exempt from disclosure:

Proposal Page / Section	Description of Information Claimed Exempt	Legal Basis for Exemption	Supporting Explanation / Citation

The Proposer understands that marking information as “confidential,” “proprietary,” or “trade secret” does not, by itself, establish an exemption from disclosure under the Pennsylvania Right-to-Know Law.

The Township will make disclosure determinations in accordance with applicable law. The Proposer is responsible for supporting any claimed exemption.

Authorized Representative	
Title	
Firm	
Signature	
Date	