



Township of Moon

Request for Proposals: Strategic Management Planning Program Proposal and Five-Year Financial Plan

ToM Strategic Management Planning Program Proposal and Five-Year Financial Plan RFP

Responses Due: June 2, 2025 – 2:00PM EST

Contact: Krista M. Watt, Finance Director – kwatt@moontwp.us

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Project Overview

The Township of Moon (“Moon”) seeks a qualified vendor to produce a Strategic Management Planning Program (STMPP) Management and Five-Year Financial Plan. Moon is facing a variety of critical issues and wishes to take a proactive approach with the use of a consultant to determine actionable short-term and long-term recommendations for operations and fiscal management.

Organization Profile

With over 27,000 residents in 24 square miles, Moon is a growing outer ring suburb in Allegheny County, Pennsylvania. It is home to Robert Morris University, the Pittsburgh International Airport, and several corporate headquarters, including FedEx Ground and Dick’s Sporting Goods. The organization currently employs 90 FTEs with seasonal expansion. Two of the departments below are unionized and governed by separate collective bargaining agreements. Non-union employees adhere to the current employee policy manual. There are two organizations that may influence future growth of Moon staff and/or its needs: The independent local public library and its volunteer fire services.

Current Departments:

- | | |
|-------------------------|--------------------------|
| - Administration | - Public Works |
| - Finance | - Police |
| - Community Development | - MCA-TV |
| - Parks & Recreation | - Information Technology |

Moon operates under the Pennsylvania Second Class Township Code and with a supervisor -manager form of government. The Board of Supervisors is comprised of five members and meets twice a month. The current Township Manager has held the position for 10 years.

Increasing development and a high performing school district have made Moon an attractive destination for single family housing as well as dense development, such as townhomes and luxury apartments. An increase in median income and available residential property have created an increased demand for Moon’s services. However, tax rates have not been adjusted, nor a long-term plan crafted of Moon’s capital needs to sustain and adjust to the increased demands on services. Furthermore, the severity of weather events in recent years have raised concerns about Moon’s climate resiliency and the financial and operational effects these occurrences have.

Anticipated Schedule of Events

Listed below are specific and estimated dates and actions related to this RFP. The actions with specific dates must be completed as indicated unless otherwise amended by Moon. In the event that it is necessary to adjust any of the specific dates and times in the calendar of events listed below, it will do so by issuing an addendum to this RFP. All addenda will be posted to the Moon website, www.moontwp.us.

Action	Date/Time
RFP Issued	May 14, 2025
Deadline for Questions Received	May 20, 2025 – Noon EST
Answers for Questions Posted	May 22, 2025
Deadline for Receipt of Proposals	June 2, 2025 – 2PM EST
Project Award Date	June 4, 2025*
Contract Review Period	June 2025
Research/Report Development	June - October 2025
Reports Due	October 29, 2025**

* Requires approval from the Board of Supervisors

**Tentative presentation date to the Board of Supervisors; If the vendor believes that a longer period of time is required for research and report development, an updated timeline should be suggested and included within the proposal.

Proposal Submittals

One original, physical document and one digital document in PDF format of the complete RFP must be received by Noon EST, June 2, 2025.

The original physical copy must be submitted in a sealed envelope or container stating on the outside the vendor's name, address, telephone number, and RFP title and delivered to:

**Township of Moon
ATTN: Krista M. Watt
1000 Beaver Grade Road
Moon Township, PA 15108**

Hand-carried and U.S Mail proposals may be delivered to the above address ONLY between the hours of 8:00 AM and 4:00 PM, EST, Mondays, Tuesdays, & Thursdays, 8:00 AM and 7:00 PM, EST, Wednesdays, and 8:00 AM and Noon, EST, Fridays, excluding holidays observed by Moon. Any proposal received after Noon EST, June 2, 2025, will not be considered and will be returned unopened.

Proposal Submittals (cont.)

The proposal must be signed by an officer of the company who is legally authorized to enter into a contractual relationship in the name of the vendor.

The submittal of a proposal by a vendor will be considered by Moon as constituting an offer by the vendor to perform the required services at the stated fees.

Communication with Representatives

All communications regarding this RFP from vendors and other sources **MUST** be directed to:

Krista M. Watt, Finance Director
Township of Moon
1000 Beaver Grade Road
Moon Township, PA 15108
kwatt@moontwp.us

Requests for information by vendor(s) regarding the meaning or interpretation of terms or requirements in this RFP must be requested of the contact person listed above, in writing, via e-mail. Phone calls and other forms of communication will not be accepted.

Vendors are advised that from the date of release of this RFP until the award of the contract, NO contact with Moon personnel or Moon officials is permitted, except as authorized by the contact person listed above. Any such unauthorized contact will result in the disqualification of the vendor's submittal.

Additional Information/Addenda

Requests for additional information or clarifications must be made in writing, as described above, to be received no later than Noon EST, May 19, 2025. The request must contain the vendor's name, contact person, and information requested. All questions must be submitted by email to the contact person listed above. All questions received via e-mail will be posted to the Moon website, www.moontwp.us, on May 22, 2025.

Moon will issue any corrections or amendments it deems necessary in written addenda on or before May 22, 2025. Vendors should not rely on any representations, statements or explanations other than those made in this RFP or in any addendum to this RFP. Where there appears to be a conflict between the RFP and any addenda issued, the last addendum issued will prevail.

Additional Information/Addenda (cont.)

Vendors shall quote a complete, entire system that is functional and usable by Moon and addresses the needs expressed within this RFP without the requirement for change orders. Any items that the vendor's product cannot or will not be able to address for the price quoted must be clearly noted within the RFP response. Moon does not intend to allow any change orders, which will increase the cost as quoted by the vendor and will expect that the vendor include any and all components in the price quoted so as to implement a complete and functional project.

Right to Request Additional Information

Moon reserves the right to request any additional information that might be deemed necessary during the evaluation process.

Late Proposals/Modification

Proposals and/or modifications received after the RFP due date and time are late and will not be considered. Proposals submitted early may be withdrawn by the vendor prior to the proposal due date specified. Following the proposal due date, the proposal constitutes a binding offer and may not be withdrawn by the vendor prior to the award.

Postponement/Cancellation/Waiver of Irregularities

Moon may, at its sole and absolute discretion, reject any and all, or parts of any and all, proposals; re-advertise this RFP; postpone or cancel, at any time, this RFP process; or waive any irregularities in this RFP or in the proposals received as a result of this RFP.

Costs Incurred

All expenses involved with the preparation and submission of proposals to Moon, or any work performed in connection therewith shall be borne by the vendor(s). No payment will be made for any responses received, or for any other effort required of or made by the vendor(s) prior to commencement of work as defined by a contract approved by the Board of Supervisors.

Exceptions to the RFP

Exceptions to any of the terms of this RFP to which a vendor will not or does not agree must be presented by the vendor in writing as a part of the proposal. Such exceptions must be specific, and the vendor must state a reason for each exception and propose alternative language, if appropriate. The purpose of the exception process is to permit Moon to correct, prior to the opening of the proposals, any technical or contractual requirement, provision, ambiguity or conflict in the RFP and related documents, which may be unlawful, improvident, unduly restrictive of competition or otherwise inappropriate. Unless timely submitted as an exception, any such ambiguity, conflict or problem shall be resolved in favor of Moon.

Proprietary Information

Responses to this RFP upon receipt by Moon become public records subject to the provisions of Pennsylvania Right to Know Law.

Qualifications

As a part of the proposal evaluation process, Moon may conduct a background investigation of said vendor. Vendor's submission of a proposal constitutes acknowledgment of the process and consent to such investigation.

No proposal shall be accepted from, nor will any contract be awarded to, any vendor who is in arrears to Moon upon any debt, fee, tax or contract, or who is a defaulter, as surety or otherwise, upon any obligation to Moon, or who is otherwise determined to be irresponsible or unreliable by Moon.

If the vendor is determined to be irresponsible or unreliable, Moon will notify the vendor of its finding, including evidence used, and allow the vendor an informal conference and opportunity to come into compliance within terms specified by Moon and its legal counsel.

Negotiations

Moon may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the vendor's best terms from a technical as well as a pricing standpoint.

Moon reserves the right to enter into contract negotiations with the selected vendor. If Moon and the selected vendor cannot negotiate a successful contract, Moon may terminate said negotiations and begin negotiations with the next highest scoring vendor. This process will continue until a contract has been executed, all vendors have been rejected, or Moon suspends the RFP process. No vendor shall have any rights against Moon arising from such negotiations.

Rules, Regulations, Licensing Requirements

The vendor shall comply with all laws, ordinances and regulations applicable to the services contemplated herein, including those applicable to conflict of interest and collusion. Vendors are presumed to be familiar with all Federal, State and local laws, ordinances, codes and regulations that may in any way affect the services offered.

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Review of Proposals

Each proposal will be reviewed to determine if it is responsive to the submission requirements outlined in the RFP. A responsive proposal is one which follows the requirements of the RFP, includes all required documentation, is submitted in the format outlined in the RFP, and is of timely submission. Failure to comply with these requirements may deem your proposal non-responsive.

The vendor(s) will be selected from the qualified responses to the RFP. The selection process will be as follows:

- All proposals received will be reviewed by Moon to ensure that all administrative requirements of the RFP package have been met by the vendors.
- Each RFP will be reviewed to ensure that the vendor submitted a separately packaged cost proposal and technical proposal, only technical information is included in the technical proposal and only cost information is included in the cost proposal. Failure to meet these requirements may be cause for rejection of a proposal. All technical proposals will need to meet the administrative requirements before moving onto further evaluation.
- Cost will be evaluated only after technical evaluations are complete, and only for those vendors deemed likely to be selected, based on technical evaluations. Information relative to cost proposals should be submitted in a separate, sealed envelope OR separate digital document and clearly marked with the vendor name and the phrase "COST PROPOSAL."
- A final rubric will grade all interactions, including the initial proposal.

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Structure of Proposals

As previously stated, all proposals will contain 2 parts, the technical proposal and the cost proposal.

Technical Proposal

The format of the technical proposal is as follows:

- Executive Summary
 - o Provides main point of contact for proposal
- Company Background
- Service Proposal
 - o Response to Scope of Work and Engagement Objectives
 - o Include Management Review Approach and Utilization of Municipal Resources
- Project Plan with Timeline
- Staffing Plan
 - o Include biography of project manager
- 3 Client References
 - o All should be previous STMPP recipients
- Addendum

Scope of Work

Moon has applied for grant funds offered by the Commonwealth of Pennsylvania, Department of Community and Economic Development (DCED)'s Strategic Management Planning Program (STMPP). The purpose of the program is to establish short- and long-term financial and managerial objectives that will strengthen the fiscal capacity of the municipal government along with the integration of long-term community and economic development strategies that strengthen the area's tax base. STMPP is designed, in part, on recommended financial management practices of the Government Finance Officers Association (GFOA).

The vendor applying in response to this RFP should address the critical functions of [STMPP](#).

Engagement Objectives

STMPP is guided by a philosophy that establishes five specific measures that a local government can take to manage its financial position and achieve or maintain its long-term economic viability:

- Expenditure Reduction
- Revenue Enhancement
- Implementation of a Long-Term Economic Development Strategy
- Adoption of Best Management Practices to Achieve Operating Efficiencies
- Pursuit of Intergovernmental Cost-Sharing Strategies.

STMPP requires that the municipality prioritize its most critical needs and establish a process that ensures that resources are focused on areas of highest priority, thus creating a “triage” approach to fiscal distress intervention.

STMPP must be designed to meet the individual and specific needs of the Municipality. The development of the plan is to be divided into 6 steps:

Step 1 Financial Condition Assessment – This assessment is to be performed as a means to establish a realistic baseline of Moon’s historic and financial condition. A review of each fund starting with the General Fund and all funds that exist for Moon. This review should include a minimum of five years of detailed historical financial data.

Step 2 Financial Trend Analysis – Performed over a multi-year period, this analysis will project future revenue, expenditure, economic and demographic trends for a five-year period so that Moon can understand its future financial position and take immediate steps to counteract any negative trends.

Step 3 Emergency Plan for Current Fiscal Year (if necessary) – The Multi-Year Financial Management Plan should allow Moon to pursue both short- and long-term strategies on parallel tracks. If the above analysis has identified a critical cash flow situation that may impact on the health, safety and welfare of residents, an Emergency Plan should be included to address actions to be taken during a 6- to 12-month timeframe to avoid a fiscal emergency. The Emergency Plan, if applicable, should set forth a strategy regarding:

1. Whether the current fiscal year’s budget can and should be reopened, amended or modified,
2. Whether operational and/or personnel reductions should occur,
3. Whether short-term borrowing, including possible unfunded debt borrowing, is necessary, and
4. Whether other types of administrative reorganization or short-term actions should be effectuated in order for Moon to remain solvent in the current fiscal year.

Engagement Objectives (cont.)

Step 4 Management Audit – The vendor shall perform a management audit of all departments and operations. The audit is to include narrative summaries of each department comprised of budget and personnel information as well as other relevant data. This data is to be supported by interviews with members of the governing body, management, department heads, and key staff members as may be required in order to facilitate the most comprehensive view of Moon’s most critical operational needs. Recommended structure, command, scheduling and staffing levels (based on “best practices” for local government service delivery) should be provided for each department so that it will be possible for management to use a “benchmarking” strategy to address operational deficiencies. The management audit shall encompass any and all areas outlined by Moon during the research process by the vendor.

Step 5 Multi-Year Plan Strategy – The plan, at its foundation, will identify Moon’s top three financial management priorities. Additional prioritization should be conducted at the departmental level, and interdepartmental objectives that are municipal-wide. These should be detailed in the plan. Each objective is to contain a detailed action plan that describes:

- 1) Policy Objectives to be Achieved
- 2) Associated Budgetary Impact
- 3) The Timing and Deadlines for each Action Step
- 4) Which Employee and/or Department has Primary Responsibility for the Objective.

Step 6 Multi-Year Plan Implementation – STMPP is an ongoing process and an adopted plan must be evaluated, adjusted and adopted each year. A master implementation schedule should be created that specifies key deadlines for each objective set forth in the plan. The key to the ultimate implementation of the plan is this schedule, which will serve to monitor whether or not individual department objectives are being met. This provides means by which the local government can measure its overall progress in implementing the plan.

The consultant will be expected to work with a consortium of individuals representing the Moon’s management, elected officials and any community members appointed by the governing body.

Engagement Objectives (cont.)

The following reports are expected during the course of and at the completion of the engagement. Additional reports suggested by the vendor will be considered upon recommendation but may not be selected by Moon.

1. Assessment of Financial Condition
2. Financial Trend Analysis
3. Management Audit
4. Five-Year Plan

Management Review Approach

Provide a statement reflecting an understanding as to the scope of work requested and briefly describe the company's management review approach and provide specific illustrations of the review procedures which will be employed. Submit at least one sample of a recent management audit report prepared by your firm for a governmental unit.

Utilization of Municipal Resources

Provide an estimate of the number of hours of the course of the project which will be required of Moon's staff to assist with the provision of data, interviews, and meetings. Please outline by group of positions (i.e Management, Department Heads, General Staff), specific position, and/or department.

Non-Specified Information

If vendors wish to include information in their proposals that is not explicitly requested in this document, such information should be submitted as an addendum.

Cost Proposal

The cost proposal should include the following:

1. **Compensation:** The estimated **maximum** number of hours and hourly rates by staff classification necessary to complete the engagement. The estimated out-of-pocket costs and the resulting all-inclusive **maximum** fee for which the requested work will be done.
2. **Billings and Payment Terms:** Proposers shall include required payment terms and milestones which generate billing.

Tax Exempt Status

Moon is exempt from the payment of any Pennsylvania sales tax and Federal excise or transportation taxes. The proposal price(s) shall be net, exclusive of taxes.

Pricing Eligibility Period

All vendor proposals are required to be offered for a term not less than 180 calendar days in duration. A proposal may not be modified, withdrawn or cancelled by a vendor during the 180-day time period following the time and date designated for the receipt of proposals.