

PURCHASE OF SERVICE AGREEMENT

THIS PURCHASE OF SERVICE AGREEMENT, made and entered into on the _____ day of March, 2026, by and between the **LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT**, an urban county government of the COMMONWEALTH OF KENTUCKY created pursuant to KRS Chapter 67A ("LFUCG"), 200 East Main Street, Lexington, Kentucky 40507, and Perez Planning + Design, LLC, a Georgia corporation, ("Organization") with offices located at 878 Peachtree Street NE, Suite 827, Atlanta, GA, 30309.

WITNESSETH

NOW, THEREFORE, in consideration of the mutual promises and covenants set forth herein, the receipt and sufficiency of which are acknowledged, the parties hereby agree as follows:

1. EFFECTIVE DATE; TERM. This Agreement shall commence on April 1, 2026 and shall last for a period of 2 year(s) unless terminated by LFUCG at an earlier time.

2. RELATED DOCUMENTS. This Agreement shall consist of the terms herein as well as the following additional documents, which are attached hereto as exhibits and incorporated herein by reference as if fully stated:

- a. Exhibit "A" – LFUCG RFP #32-2025
- b. Exhibit "B" – Consultant Proposal
- c. Exhibit "C" – Negotiated Scope

To the extent that there is any conflict between or among any of these documents, the terms and provisions of this Agreement shall prevail, followed by terms and provisions of Exhibit "A", "B" and "C" in that order.

3. SCOPE OF SERVICES. Organization shall perform the services outlined in the attached Exhibit "A" – LFUCG RFP #32-2025 and Exhibit "C" Negotiated Scope for LFUCG in a timely, workmanlike and professional manner (the "Services").

4. PAYMENT. LFUCG shall pay Organization a total amount not to exceed Four Hundred Forty-Two Thousand Five Hundred Dollars (\$442,500) for the performance of the Services. Such payments shall be made monthly after project deliverables have been completed, as outlined in Exhibits "A" and "C". The funds are limited to the services provided herein and may not be spent by the Organization for any other purpose without the prior written consent of LFUCG. Absent any additional written agreement stating otherwise any travel or other expenses are included in the above payment.

a. LFUCG shall make payment under this Agreement upon timely submission of an invoice(s) from Organization specifying that the Services have been performed, accompanied by data satisfactory to LFUCG to document entitlement to payment for the Services performed to date. LFUCG shall have thirty (30) days from the date of receipt of the invoice to pay the invoice amount. LFUCG reserves the right to refuse payment if it is determined by LFUCG that the Services performed, or materials provided for the Services are inadequate or defective.

b. LFUCG also reserves the right to reject any invoice submitted for services more than sixty (60) days after the services were rendered.

5. TERMINATION. LFUCG, through the Mayor or the Mayor's designee, may terminate this Agreement for any reason whatsoever by providing Organization with at least thirty (30) days advance written notice. Organization shall be entitled for payment of all work performed up to that period of time, calculated on a reasonable basis.

a. In the event of a termination based upon a material condition of non-performance or default by Organization, LFUCG shall provide Organization advance written notice and a reasonable period of time to cure the breach.

b. Organization may only terminate this Agreement based upon LFUCG's failure to timely pay for properly invoiced and accepted work. Organization shall provide LFUCG with at least thirty (30) days advance written notice and an opportunity to cure prior to termination.

c. Organization acknowledges that LFUCG is a governmental entity, and that the validity of this Agreement is based upon the availability of appropriated funding. In the event that such funding is not appropriated in a future fiscal year, LFUCG's obligations under this Agreement shall automatically expire without penalty to the LFUCG thirty (30) days after written notice to Organization. LFUCG shall exercise any application of this provision in good faith.

6. REPORTING. Organization shall provide LFUCG with timely reports and updates related to the provisions of the Services in the form and manner reasonably specified by LFUCG.

7. REGISTRATION; COMPLIANCE; AUTHORITY TO SIGN. Organization shall be lawfully registered or authorized to do business in the Commonwealth of Kentucky and Lexington-Fayette County and shall at all times comply with any and all applicable federal, state, and local laws, ordinances, and regulations. LFUCG may request proof that Organization has timely filed federal, state, or local tax forms which shall be provided by Organization on a timely basis. The person signing this Agreement on behalf of Organization is fully authorized to do so.

8. INSURANCE; INDEMNITY.

The risk management provisions of RFP No. 32-2025 are incorporated herein by reference as if fully stated. Copies of the required Certificates of Insurance shall be provided to the LFUCG as required therein.

9. RECORDS. Organization shall keep and make available to LFUCG any records related to this Agreement as are necessary to support its performance of the services for a period of at least ten (10) years following the expiration or termination of this Agreement, or as otherwise required depending upon the source of funds. Books of accounts shall be kept by Organization and entries shall be made therein of all money, goods, effects, debts, sales, purchases, receipts, payments and any other transactions of Organization related to this Agreement and shall be made available to LFUCG upon request.

a. LFUCG shall be the owner of all final documents, data, studies, plans, reports, and information prepared by Organization under this Agreement.

b. Organization understands and agrees that this Agreement and any related documents may be subject to disclosure under the Kentucky Open Records Act and will comply with any reasonable request by LFUCG to provide assistance with such a request.

10. ACCESS. Organization shall allow LFUCG any necessary reasonable access to monitor its performance under this Agreement.

11. CONTRACTUAL RELATIONSHIP ONLY. In no event shall the parties be construed, held or become in any way for any purpose the employee of the other party, or partners, associates or joint ventures in the conduct of their respective endeavors or otherwise.

12. EQUAL OPPORTUNITY; FAIRNESS ORDINANCE. Organization shall provide equal opportunity in employment for all qualified persons, and shall (a) prohibit discrimination in employment because of race, color, creed, national origin, sex, age, sexual orientation, gender identity, or handicap, (b) promote equal employment through a positive, continuing program of equal employment, and (c) cause any subcontractor or agency receiving funds provided pursuant to this Agreement to do so. This program of equal employment opportunity shall apply to every aspect of its employment policies and practices. Organization agrees to comply with LFUCG's Fairness Ordinance (Ordinance No. 201-99) and all sources of applicable law, including those specified in any Exhibit attached to this Agreement and incorporated herein by reference.

13. SEXUAL HARASSMENT. Organization must adopt or have adopted a written sexual harassment policy, which shall, at a minimum, contain a statement of current law; a list of prohibited behaviors; a complaint process; and a procedure which provides for a confidential investigation of all complaints. The policy shall be given to all employees and

clients and shall be posted at all locations where Organization conducts business. The policy shall be made available to LFUCG upon request.

14. INVESTMENT. Any investment of the funds received pursuant to this Agreement must fully comply with any restrictions imposed by law.

15. NO ASSIGNMENT. Organization may not assign any of its rights and duties under this Agreement without the prior written consent of LFUCG.

16. NO THIRD PARTY RIGHTS. This Agreement does not create a contractual relationship with or right of action in favor of a third party against either Organization or LFUCG.

17. KENTUCKY LAW AND VENUE. This Agreement shall be governed in all respects by the laws of the Commonwealth of Kentucky and venue for all actions shall lie in the Circuit Court of Fayette County, Kentucky.

18. AMENDMENTS. By mutual agreement, the parties to this Agreement may, from time to time, make written changes to any provision hereof. Organization acknowledges that LFUCG may make such changes only upon approval of its legislative authority, the Lexington-Fayette Urban County Council, and the signature of its Mayor.

19. NOTICE. Any written notice required by the Agreement shall be delivered by certified mail, return receipt requested, to the following:

For Organization:

Perez Planning + Design, LLC
878 Peachtree Street NE, Suite 827
Atlanta, GA 30309

For Government:

Lexington-Fayette Urban County Government
200 East Main Street
Lexington, Kentucky 40507
Attn: Parks and Recreation, Michelle Kosieniak

20. WAIVER. The waiver by either party of any breach of any provision of this Agreement shall not constitute a continuing waiver or waiver of any subsequent breach by either party of either the same or another provision.

21. ENTIRE AGREEMENT. This Agreement shall constitute the entire agreement between the parties and no representations, inducements, promises or agreements, oral

or otherwise, which are not embodied herein shall be effective for any purpose. This Agreement shall replace any previous agreement between the parties on the same subject matter.

IN WITNESS WHEREOF, the parties have executed this Agreement at Lexington, Kentucky, the day and year first above written.

LEXINGTON-FAYETTE URBAN
COUNTY GOVERNMENT

BY: _____
LINDA GORTON, MAYOR

ATTEST:

Clerk of the Urban County Council

ENTITY PEREZ PLANNING + DESIGN, LLC

BY: _____
CARLOS PEREZ - PRESIDENT

ATTEST:

WITNESS: _____

DATE: _____

EXHIBIT "A"

Lexington/Fayette Urban County Government
Addendum for Services
RFP 32-2025



Lexington-Fayette Urban County Government

Request for Proposals

The Lexington-Fayette Urban County Government hereby requests proposals for **RFP #32-2025 Parks and Recreation Master Plan** to be provided in accordance with terms, conditions and specifications established herein.

Sealed proposals will be received through Ion Wave until **2:00 PM**, prevailing local time, on **October 8, 2025**. All forms and information requested in RFP must be included and attached in Response Attachments tab in Ion Wave.

Proposals received after the date and time set for opening proposals will not be accepted. It is the sole responsibility of the Proposer to assure that his/her proposal is submitted in Ion Wave before the date and time set for opening proposals.

Proposals, once submitted, may not be withdrawn for a period of ninety (90) calendar days.

The Lexington-Fayette Urban County Government reserves the right to reject any or all proposals, and to waive technicalities and informalities when such waiver is determined by the Lexington-Fayette Urban County Government to be in its best interest.

Signature of this proposal by the Proposer constitutes acceptance by the Proposer of terms, conditions and requirements set forth herein.

Minor exceptions may not eliminate the proposal. Any exceptions to the specifications established herein shall be listed in detail on a separate sheet and attached hereto. The Lexington-Fayette Urban County Government shall determine whether any exception is minor.

The Lexington-Fayette Urban County Government encourages the participation of minority- and women-owned businesses in Lexington-Fayette Urban County Government contracts. This proposal is subject to Affirmative Action requirements attached hereto.

Please do not contact any LFUCG staff member or any other person involved in the selection process other than the designated contact person(s) regarding the project contemplated under this RFP while this RFP is open and a selection has not been finalized. Any attempt to do so may result in disqualification of the firm's submittal for consideration.

Laws and Regulations

All applicable state laws, municipal ordinances and regulations of all authorities having jurisdiction over the project shall apply to the contract, and shall be deemed to be incorporated herein by reference.

Equal Employment Opportunity

The Entity (regardless of whether construction contractor, non-construction contractor or supplier) agrees to provide equal opportunity in employment for all qualified persons, to prohibit discrimination in employment because of race, color, religion, sex (including pregnancy, sexual orientation or gender identity), national origin, disability, age, genetic information, political affiliation, or veteran status, and to promote equal employment through a positive, continuing program from itself and each of its sub-contracting agents. This program of equal employment opportunity shall apply to every aspect of its employment policies and practices.

Kentucky Equal Employment Opportunity Act

The Kentucky Equal Employment Opportunity Act of 1978 (KRS 45.560-45.640) requires that any "county, city, town, school district, water district, hospital district, or other political subdivision of the state shall include in directly or indirectly publicly funded contracts for supplies, materials, services, or equipment hereinafter entered into the following provisions:

"During the performance of this contract, the contractor agrees as follows:

- (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, or national origin;
- (2) The contractor will state in all solicitations or advertisements for employees placed by or on behalf of the contractors that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, age, or national origin;
- (3) The contractor will post notices in conspicuous places, available to employees and applicants for employment, setting forth the provision of the nondiscrimination clauses required by this section; and
- (4) The contractor will send a notice to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding advising the labor union or workers'

representative of the contractor's commitments under the nondiscrimination clauses."

The Act further provides:

"KRS 45.610. Hiring minorities -- Information required

(1) For the length of the contract, each contractor shall hire minorities from other sources within the drawing area, should the union with which he has collective bargaining agreements be unwilling to supply sufficient minorities to satisfy the agreed upon goals and timetables.

(2) Each contractor shall, for the length of the contract, furnish such information as required by KRS 45.560 to KRS 45.640 and by such rules, regulations and orders issued pursuant thereto and will permit access to all books and records pertaining to his employment practices and work sites by the contracting agency and the department for purposes of investigation to ascertain compliance with KRS 45.560 to 45.640 and such rules, regulations and orders issued pursuant thereto.

KRS 45.620. Action against contractor -- Hiring of minority contractor or subcontractor

(1) If any contractor is found by the department to have engaged in an unlawful practice under this chapter during the course of performing under a contract or subcontract covered under KRS 45.560 to 45.640, the department shall so certify to the contracting agency and such certification shall be binding upon the contracting agency unless it is reversed in the course of judicial review.

(2) If the contractor is found to have committed an unlawful practice under KRS 45.560 to 45.640, the contracting agency may cancel or terminate the contract, conditioned upon a program for future compliance approved by the contracting agency and the department. The contracting agency may declare such a contractor ineligible to bid on further contracts with that agency until such time as the contractor complies in full with the requirements of KRS 45.560 to 45.640.

(3) The equal employment provisions of KRS 45.560 to 45.640 may be met in part by a contractor by subcontracting to a minority contractor or subcontractor. For the provisions of KRS 45.560 to 45.640, a minority contractor or subcontractor shall mean a business that is owned and controlled by one or more persons disadvantaged by racial or ethnic circumstances.

KRS 45.630 Termination of existing employee not required, when

Any provision of KRS 45.560 to 45.640 notwithstanding, no contractor shall be required to terminate an existing employee upon proof that employee was employed prior to the date of the contract.

KRS 45.640 Minimum skills

Nothing in KRS 45.560 to 45.640 shall require a contractor to hire anyone who fails to demonstrate the minimum skills required to perform a particular job."

It is recommended that all of the provisions above quoted be included as special conditions in each contract. In the case of a contract exceeding \$250,000, the contractor is required to furnish evidence that his workforce in Kentucky is representative of the available work-force in the area from which he draws employees, or to supply an Affirmative Action plan which will achieve such representation during the life of the contract.

LFUCG Non-Appropriation Clause

Contractor acknowledges that the LFUCG is a governmental entity, and the contract validity is based upon the availability of public funding under the authority of its statutory mandate.

In the event that public funds are unavailable and not appropriated for the performance of the LFUCG's obligations under this contract, then this contract shall automatically expire without penalty to the LFUCG thirty (30) days after written notice to Contractor of the unavailability and non-appropriation of public funds. It is expressly agreed that the LFUCG shall not activate this non-appropriation provision for its convenience or to circumvent the requirements of this contract, but only as an emergency fiscal measure during a substantial fiscal crisis, which affects generally its governmental operations.

In the event of a change in the LFUCG's statutory authority, mandate and mandated functions, by state and federal legislative or regulatory action, which adversely affects the LFUCG's authority to continue its obligations under this contract, then this contract shall automatically terminate without penalty to the LFUCG upon written notice to Contractor of such limitation or change in the LFUCG's legal authority.

Contention Process

Vendors who respond to this invitation have the right to file a notice of contention associated with the RFP process or to file a notice of appeal of the recommendation made by the Director of Central Purchasing resulting from this invitation.

Notice of contention with the RFP process must be filed within 3 business days of the bid/proposal opening by (1) sending a written notice, including sufficient documentation to support contention, to the Director of the Division of Central Purchasing or (2)

submitting a written request for a meeting with the Director of Central Purchasing to explain his/her contention with the RFP process. After consulting with the Commissioner of Finance the Chief Administrative Officer and reviewing the documentation and/or hearing the vendor, the Director of Central Purchasing shall promptly respond in writing findings as to the compliance with RFP processes. If, based on this review, a RFP process irregularity is deemed to have occurred the Director of Central Purchasing will consult with the Commissioner of Finance, the Chief Administrative Officer and the Department of Law as to the appropriate remedy.

Notice of appeal of a RFP recommendation must be filed within 3 business days of the RFP recommendation by (1) sending a written notice, including sufficient documentation to support appeal, to the Director, Division of Central Purchasing or (2) submitting a written request for a meeting with the Director of Central Purchasing to explain his appeal. After reviewing the documentation and/or hearing the vendor and consulting with the Commissioner of Finance and the Chief Administrative Officer, the Director of Central Purchasing shall in writing, affirm or withdraw the recommendation.

SELECTION CRITERIA:

The LFUCG's Selection Committee shall consider the following factors when it evaluates the proposals received:

1. Professional qualifications and experience of the team (15 points)
2. The specificity of the RFP response as related to stated scope and objectives (15 points)
3. Level of creativity, innovation and relevance of proposed approaches to scope of work (25 points)
4. Quantity and quality of previous park master plan work and references (20 points)
5. Adherence to budget and timeline on previous contracts with LFUCG or other public agencies and municipalities (15 points)
6. Cost of Services (10 points)

Proposals shall contain the appropriate information necessary to evaluate based on these criteria. A committee composed of government employees as well as representatives of relevant user groups will evaluate the proposals.

Questions regarding this RFP shall be addressed through:
<https://lexingtonky.ionwave.net>

Affirmative Action Plan

All vendors must submit as a part of the proposal package the following items to the Urban County Government:

1. Affirmative Action Plan for his/her firm;
2. Current Work Force Analysis Form;

Failure to submit these items as required may result in disqualification of the submitter from award of the contract

AFFIDAVIT

Comes the Affiant, _____, and after being first duly sworn, states under penalty of perjury as follows:

1. His/her name is _____ and he/she is the individual submitting the proposal or is the authorized representative of _____, the entity submitting the proposal (hereinafter referred to as "Proposer").

2. Proposer will pay all taxes and fees, which are owed to the Lexington-Fayette Urban County Government at the time the proposal is submitted, prior to award of the contract and will maintain a "current" status in regard to those taxes and fees during the life of the contract.

3. Proposer will obtain a Lexington-Fayette Urban County Government business license, if applicable, prior to award of the contract.

4. Proposer has authorized the Division of Central Purchasing to verify the above-mentioned information with the Division of Revenue and to disclose to the Urban County Council that taxes and/or fees are delinquent or that a business license has not been obtained.

5. Proposer has not knowingly violated any provision of the campaign finance laws of the Commonwealth of Kentucky within the past five (5) years and the award of a contract to the Proposer will not violate any provision of the campaign finance laws of the Commonwealth.

6. Proposer has not knowingly violated any provision of Chapter 25 of the Lexington-Fayette Urban County Government Code of Ordinances, known as "Ethics Act."

Continued on next page

7. Proposer acknowledges that "knowingly" for purposes of this Affidavit means, with respect to conduct or to circumstances described by a statute or ordinance defining an offense, that a person is aware or should have been aware that his conduct is of that nature or that the circumstance exists.

Further, Affiant sayeth naught.

STATE OF _____

COUNTY OF _____

The foregoing instrument was subscribed, sworn to and acknowledged before me
by _____ on this the _____ day
of _____, 20__.

My Commission expires: _____

NOTARY PUBLIC, STATE AT LARGE

EQUAL OPPORTUNITY AGREEMENT

Standard Title VI Assurance

The Lexington Fayette-Urban County Government, (hereinafter referred to as the "Recipient") hereby agrees that as a condition to receiving any Federal financial assistance from the U.S. Department of Transportation, it will comply with Title VI of the Civil Rights Act of 1964, 78Stat.252, 42 U.S.C. 2000d-4 (hereinafter referred to as the "Act"), and all requirements imposed by or pursuant to Title 49, Code of Federal Regulations, U.S. Department of Transportation, Subtitle A, Office of the Secretary, (49 CFR, Part 21) Nondiscrimination in Federally Assisted Program of the Department of Transportation – Effectuation of Title VI of the Civil Rights Act of 1964 (hereinafter referred to as the "Regulations") and other pertinent directives, no person in the United States shall, on the grounds of race, color, national origin, sex, age (over 40), religion, sexual orientation, gender identity, veteran status, or disability be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Recipient receives Federal financial assistance from the U.S. Department of Transportation, including the Federal Highway Administration, and hereby gives assurance that will promptly take any necessary measures to effectuate this agreement. This assurance is required by subsection 21.7(a) (1) of the Regulations.

The Law

- Title VII of the Civil Rights Act of 1964 (amended 1972) states that it is unlawful for an employer to discriminate in employment because of race, color, religion, sex, age (40-70 years) or national origin.
- Executive Order No. 11246 on Nondiscrimination under Federal contract prohibits employment discrimination by contractor and sub-contractor doing business with the Federal Government or recipients of Federal funds. This order was later amended by Executive Order No. 11375 to prohibit discrimination on the basis of sex.
- Section 503 of the Rehabilitation Act of 1973 states:

The Contractor will not discriminate against any employee or applicant for employment because of physical or mental handicap.

- Section 2012 of the Vietnam Era Veterans Readjustment Act of 1973 requires Affirmative Action on behalf of disabled veterans and veterans of the Vietnam Era by contractors having Federal contracts.
- Section 206(A) of Executive Order 12086, Consolidation of Contract Compliance Functions for Equal Employment Opportunity, states:

The Secretary of Labor may investigate the employment practices of any Government contractor or sub-contractor to determine whether or not the contractual provisions specified in Section 202 of this order have been violated.

The Lexington-Fayette Urban County Government practices Equal Opportunity in recruiting, hiring and promoting. It is the Government's intent to affirmatively provide employment opportunities for those individuals who have previously not been allowed to enter into the mainstream of society. Because of its importance to the local Government, this policy carries the full endorsement of the Mayor, Commissioners, Directors and all supervisory personnel. In following this commitment to Equal Employment Opportunity and because the Government is the benefactor of the Federal funds, it is both against the Urban County Government policy and illegal for the Government to let contracts to companies which knowingly or unknowingly practice discrimination

in their employment practices. Violation of the above mentioned ordinances may cause a contract to be canceled and the contractors may be declared ineligible for future consideration.

Please sign this statement in the appropriate space acknowledging that you have read and understand the provisions contained herein. Return this document as part of your application packet.

Bidders

I/We agree to comply with the Civil Rights Laws listed above that govern employment rights of minorities, women, Vietnam veterans, handicapped and aged persons.

Signature

Name of Business

WORKFORCE ANALYSIS FORM

Name of Organization: _____

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African-American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals																	
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical																	
Skilled Craft																	
Service/Maintenance																	
Total:																	

Prepared by: _____ Date: ____/____/____

(Name and Title)

Revised 2015-Dec-15

**DIRECTOR, DIVISION OF PROCUREMENT
LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT
200 EAST MAIN STREET
LEXINGTON, KENTUCKY 40507**

**NOTICE OF REQUIREMENT FOR AFFIRMATIVE ACTION TO ENSURE EQUAL
EMPLOYMENT OPPORTUNITIES AND DBE CONTRACT PARTICIPATION**

The Lexington-Fayette Urban County Government has a Certified Minority and Women Business Enterprise seventeen percent (17%) minimum goal including minimum subgoals of five percent (5%) for Minority Business Enterprises (MBE) and a subgoal of twelve percent (12%) for Women Business Enterprises (WBE); a three (3%) minimum goal for Certified Veteran-Owned Small Businesses and/or Certified Service- Disabled Veteran Owned Businesses; and a goal of utilizing Disadvantaged Business Enterprises (DBE), where applicable, for government contracts.

For assistance in locating certified DBEs, MBEs, WBEs, VOSBs and/or VOSBs, contact Sherita Miller at 859/258-3320 or by writing the address listed below:

Sherita Miller, MPA, CPSD
Minority Business Enterprise Liaison
Division of Procurement
Lexington-Fayette Urban County Government
200 East Main Street
Lexington, Kentucky 40507
smiller@lexingtonky.gov
859-258-3323

Firm Submitting Proposal: _____

Complete Address: _____
Street City Zip

Contact Name: _____ Title: _____

Telephone Number: _____ Fax Number: _____

Email address: _____



LEXINGTON

MINORITY BUSINESS ENTERPRISE PROGRAM

Sherita Miller, MPA, CPSD
Minority Business Enterprise Liaison
Division of Procurement
Lexington-Fayette Urban County Government
200 East Main Street
Lexington, KY 40507
smiller@lexingtonky.gov
859-258-3323

OUR MISSION: The mission of the Minority Business Enterprise Program (MBEP) is to facilitate the full participation of minority and women owned businesses in the procurement process and to promote economic inclusion as a business imperative essential to the long- term economic viability of Lexington-Fayette Urban County Government.

To that end the urban county council adopted and implemented Resolution 272-2024 – a Certified Minority and Women Business Enterprise seventeen percent (17%) minimum goal including minimum subgoals of five percent (5%) for Minority Business Enterprises (MBE) and a subgoal of twelve percent (12%) for Women Business Enterprises (WBE); a three (3%) minimum goal for Certified Veteran-Owned Small Businesses and/or Certified Service- Disabled Veteran Owned Businesses; and a goal of utilizing Disadvantaged Business Enterprises (DBE), where applicable, for government contracts.

The resolution states the following definitions shall be used for the purposes of reaching these goals:

Certified Disadvantaged Business Enterprise (DBE) – a business in which at least fifty-one percent (51%) is owned, managed and controlled by a person(s) who is socially and economically disadvantaged as define by 49 CFR subpart 26.

Certified Minority Business Enterprise (MBE) – a business in which at least fifty-one percent (51%) is owned, managed and controlled by an ethnic minority (i.e. Black American, Asian American, Hispanic American, Native American)

Certified Women Business Enterprise (WBE) – a business in which at least fifty-one percent (51%) is owned, managed and controlled by a woman.

Certified Veteran-Owned Small Business (VOSB) – a business in which at least fifty-one percent (51%) is owned, managed and controlled by a veteran who served on active duty with the U.S. Army, Air Force, Navy, Marines or Coast Guard.

Certified Service -Disabled Veteran Owned Small Business (SDVOSB) – a business in which at least fifty-one percent (51%) is owned, managed and controlled by a disabled veteran who served on active duty with the U.S. Army, Air Force, Navy, Marines or Coast Guard.

The term “Certified” shall mean the business is appropriately certified, licensed, verified, or validated by an organization or entity recognized by the Division of Procurement as having the appropriate credentials to make a determination as to the status of the business.

The following certifications are recognized and accepted by the MBEP:

Kentucky Transportation Cabinet (KYTC), Disadvantaged Business Enterprise (DBE)
Kentucky Minority and Women Business Enterprise (MWBE)
Women’s Business Enterprise National Council (WBENC)
National Women Business Owners Corporation (NWBOC)
National Minority Supplier Development Council (NMSDC)
Tri-State Minority Supplier Development Council (TSMSSDC)
U.S. Small Business Administration Veteran Small Business Certification (VetCert)
Kentucky Service- Disabled Veteran Owned Small Business (SDVOSB)

To comply with Resolution 272-2024, prime contractors, minority and women business enterprises, veteran owned small businesses, and service-disabled veteran owned small businesses must complete monthly contract compliance audits in the Diverse Business Management Compliance system, <https://lexingtonky.diversitycompliance.com/>

A list of organizations that certify and/or maintain lists of certified businesses (i.e. DBE, MBE, WBE, VOSB and/or SDVOSB) is available upon request by emailing, Sherita Miller, smiller@lexingtonky.gov.



LEXINGTON

LFUCG MWDBE PARTICIPATION FORM

Bid/RFP/Quote Reference # _____

The MWDBE and/or veteran subcontractors listed have agreed to participate on this Bid/RFP/Quote. If any substitution is made or the total value of the work is changed prior to or after the job is in progress, it is understood that those substitutions must be submitted to the Division of Procurement for approval immediately. **Failure to submit a completed form may cause rejection of the bid.**

MWBE Company, Name, Address, Phone, Email	DBE/MBE WBE/VOSB/SDVOSB	Work to be Performed	Total Dollar Value of the Work	% Value of Total Contract
1.				
2.				
3.				
4.				

The undersigned company representative submits the above list of MDWBE and veteran firms to be used in accomplishing the work contained in this Bid/RFP/Quote. Any misrepresentation may result in the termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and false claims.

Company

Company Representative

Date

Title



LEXINGTON

LFUCG MWDBE SUBSTITUTION FORM

Bid/RFP/Quote Reference # _____

The substituted MWDBE and/or veteran subcontractors listed below have agreed to participate on this Bid/RFP/Quote. These substitutions were made prior to or after the job was in progress. These substitutions were made for reasons stated below and are now being submitted to the Division of Procurement for approval. By the authorized signature of a representative of our company, we understand that this information will be entered into our file for this project. **Note: Form required if a subcontractor is being substituted on a contract.**

SUBSTITUTED DBE/MBE/WBE/VOSB Company Name, Address, Phone, Email	DBE/MBE/WBE/VOSB/SDVOSB Formally Contracted/ Name, Address, Phone, Email	Work to Be Performed	Reason for the Substitution	Total Dollar Value of the Work	% Value of Total Contract
1.					
2.					
3.					
4.					

The undersigned acknowledges that any misrepresentation may result in termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and false claims.

Company

Company Representative

Date

Title



DOCUMENTATION REQUIRED FOR GOOD FAITH EFFORTS AND OUTREACH PLANS

As affirmed in Resolution Number 272-2024, the Urban County Council has adopted an annual aspirational goal of utilizing at least seventeen percent (17%) of public funds spend from certain discretionary agreements with certified Minority Business Enterprises (MBEs) and certified Woman Business Enterprises (WBEs); utilizing at least three percent (3%) of public funds from certain discretionary agreements with Certified Veteran-Owned Small Business and Certified Service-Disabled Veteran-Owned Small Businesses (VOSBs); and utilizing Disadvantaged Business Enterprises (DBEs) where applicable. Bidders should make every effort to achieve these goals.

Therefore, as an element of the responsiveness of the bid, all Bidders are required to submit documentation of their good faith and outreach efforts to ensure all businesses, including small and disadvantaged businesses such as minority-, woman-, and veteran-owned businesses, have an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement. Examples of good faith and outreach efforts that satisfy this requirement to encourage the participation of, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs include:

1. Advertised opportunities to participate in the contract in at least two (2) publications of general circulation media; trade and professional association publications; small and minority business or trade publications; and publications or trades targeting minority, women, and disadvantaged businesses not less than fifteen (15) days prior to the deadline for submission of bids to allow, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs to participate.
2. Attended LFUCG Procurement Economic Inclusion Outreach event(s) within the past year to meet new small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs to partner with on LFUCG contracts and procurements.
3. Attended pre-bid/pre-proposal meetings that were scheduled by LFUCG to inform small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs of subcontracting opportunities.
4. Sponsored Economic Inclusion event to provide networking opportunities for prime contractors and small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs.
5. Requested a list of certified small, DBE, MBE, WBE, VOSB and/or SDVOSB subcontractors or suppliers from LFUCG and showed evidence of contacting the companies on the list(s).
6. Contacted organizations that work with small, DBE, MBE, WBE, and VOSB companies for assistance in finding certified DBEs, MBEs, WBEs, VOSB and/or SDVOSBs to work

on this project. Those contacted and their responses must be a part of the bidder's outreach efforts documentation.

7. Sent written notices, by certified mail, email, or facsimile, to qualified, certified small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs soliciting their participation in the contract not less than seven (7) days prior to the deadline for submission of bids to allow them to participate effectively.
8. Followed up initial solicitations by contacting small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs via tailored communications to determine their level of interest.
9. Provided the interested small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs with adequate and timely information about the plans, specifications, and requirements of the contract.
10. Selected portions of the work to be performed by small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs in order to increase the likelihood of subcontracting participation. This includes, where appropriate, breaking out contract work items into economically feasible units to facilitate small, DBE, MBE, WBE, VOSB and/or SDVOSB participation, even when the prime contractor may otherwise perform these work items with its own workforce.
11. Negotiated in good faith with interested small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs, not rejecting them as unqualified without sound reasons based on a thorough investigation of their capabilities. Any rejection must be so noted in writing with a description as to why an agreement could not be reached.
12. Included documentation of quotations received from interested small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs that were not used due to uncompetitive pricing or were rejected as unacceptable and/or copies of responses from firms indicating that they would not be submitting a bid.
 - a. Bidder has to submit sound reasons why the quotations were considered unacceptable. The fact that the bidder has the ability and/or desire to perform the contract work with its own forces will not be considered a sound reason for rejecting a small business', DBE's MBE's, WBE's, VOSB's and/or SDVOSB's quote. Nothing in this provision shall be construed to require the bidder to accept unreasonable quotes in order to satisfy the participation goals.
13. Made an effort to offer assistance to or refer interested small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs to obtain the necessary equipment, supplies, materials, insurance and/or bonding to satisfy the work requirements of the bid proposal.

14. Made efforts to expand the search for small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs beyond the usual geographic boundaries.
15. Other – any other evidence that the bidder submits that may demonstrate that the bidder has made reasonable efforts to include small, DBE, MBE, WBE, VOSB and/or SDVOSB participation.

Bidder must document, with specificity, each of the efforts it made to include small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs as subcontractors in the procurement, including the date on which each effort was made, the medium through which each effort was made, and the outcome of each effort.

Note: Failure to submit the documentation requested in this section may be cause for rejection of bid. Bidders may include any other documentation deemed relevant to this requirement which is subject to review by the MBE Liaison. Documentation of Good Faith and Outreach Efforts must be submitted with the Bid, regardless of the proposed level of small, DBE, MBE, WBE, VOSB and/or SDVOSB participation in the procurement. If the Good Faith and Outreach Effort documentation is not submitted with the bid response, the bid may be rejected.

OUTREACH EFFORTS EVALUATION

Outreach efforts demonstrated by the bidder or respondent will be evaluated on a pass/fail basis.

ATTACHMENT A – SMALL AND DISADVANTAGED, MINORITY-, WOMEN-, AND VETERAN-OWNED BUSINESS OUTREACH PLAN

Proposer Name:	_____	Date:	_____
Project Name:	_____	Project Number:	_____
Contact Name:	_____	Telephone:	_____
Email:	_____		

The mission of the Minority Business Enterprise Program is to facilitate the full participation of disadvantaged businesses, minority-, women-, veteran-, and service-disabled veteran-owned businesses in the procurement process and to promote economic inclusion as a business imperative essential to the long-term economic viability of Lexington-Fayette Urban County Government.

To that end, small and disadvantaged businesses, including minority-, woman-, veteran-, and service-disabled veteran-owned businesses, must have an equal opportunity to be utilized in the performance of contracts with public funds spent from certain discretionary agreements. By submitting its offer, Bidder/Proposer certifies that it has taken, and if there are further opportunities will take, reasonable steps to ensure that small and disadvantaged businesses, including minority-, woman-, veteran-, and service-disabled veteran-owned businesses, are provided an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement.

The information submitted in response to this clause will not be considered in any scored evaluation. Failure to submit this form may cause the bid or proposal to be rejected.

Is the Bidder/ Proposer a certified firm? Yes ☐ No ☐

If yes, indicate all certification type(s):

DBE ☐ MBE ☐ WBE ☐ SBE ☐ VOSB/SDVOSB ☐

and supply a copy of the certificate and/or certification letter if not currently listed on the city's Minority Business Enterprise Program's (MBEP) certified list.

1. Include a list of firms that Bidder/ Proposer has had a contractual relationship with within the last two years that are minority-owned, woman-owned, veteran-owned or small businesses, regardless of their certification status.

 Click or tap here to enter text. 

2. Does Bidder/Proposer foresee any subcontracting opportunities for this procurement?

Yes ☐ No ☐

If no, please explain why in the field below. Do not complete the rest of this form and submit this first page with your bid and/or proposal.  (Click or tap here to enter text.)

If yes, please complete the following pages and submit all pages with your bid and/or proposal.

Describe the steps Bidder/Proposer took to solicit small and disadvantaged businesses, including MBEs, WBEs, VOSBs, and SDVOSBs, for subcontracting opportunities for this procurement.

3. Check the good faith and outreach efforts the Bidder/Proposer used to encourage the participation of small and disadvantaged businesses including, MBEs, WBEs, VOSBs and SDVOSBs:

- ☐ Bidder placed advertisements in search of prospective small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs for the solicitation.
- ☐ Bidder attended LFUCG Procurement Economic Inclusion Outreach event(s) within the past year.
- ☐ Bidder attended pre-bid and/or pre-proposal meetings for this solicitation.
- ☐ Bidder sponsored an Economic Inclusion Outreach event.
- ☐ Bidder requested a list of certified small, DBE, MBE, WBE, VOSB and/or SDVOSB subcontractors or suppliers from LFUCG.
- ☐ Bidder contacted organizations that work with small, DBE, MBE, WBE, VOSB and/or SDVOSB companies.
- ☐ Bidder sent written notices to certified small, DBE, MBE, WBE, VOSB and SDVOSB businesses.
- ☐ Bidder followed up to initial solicitations with interested small, DBE, MBE, WBE, VOSB and/or SDVOSB.
- ☐ Bidder provided small, DBE, MBE, WBE, VOSB and/or SDVOSB businesses interested in performing the solicited work with prompt access to the plans, specifications, scope of work, and requirements of the solicitation.
- ☐ Bidder made efforts to segment portions of the work to be performed by small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs, including dividing sub-bid/partnership opportunities into economically feasible units/parcels, to facilitate participation.

- ☐ Bidder negotiated in good faith with interested small, DBE, MBE, WBE, VOSB and/or SDVOSB businesses.
- ☐ Bidder provided adequate rationale for rejecting any small business', DBEs, MBEs, WBEs, VOSBs or SDVOSBs for lack of qualifications.
- ☐ Bidder offered assistance in obtaining bonding, insurance, financial, equipment, or other resources to small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs, in an effort to assist them in meeting project requirements.
- ☐ Bidder made efforts to expand the search for small businesses, DBEs MBEs, WBEs, VOSBs and/or SDVOSBs beyond the usual geographic boundaries.
- ☐ Bidder made other reasonable efforts to include small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs participation.

4. Bidder/Proposer must include documentation, including the date each effort was made, the medium through which each effort was made, and the outcome of each effort with this form, regardless of the level of small, DBE, MBE, WBE, VOSB and/or SDVOSB participation. Examples of required documentation include copies of email communications, copies of newspaper advertisements, or copies of quotations received from interested small businesses, DBEs, MBEs, WBEs, VOSBs or SDVOSBs.

 Click or tap here to enter text. 

For detailed information regarding outreach efforts that satisfy the MBE Program's requirements, please see "Documentation Required for Good Faith Efforts and Outreach Plans" page.

Note: The Bidder/Proposer must be willing to report the identity of each subcontractor and the value of each subcontract to MBEP if awarded a contract from this procurement.

Failure to submit the documentation requested may be cause for rejection of the bid. Bidders may include any other documentation deemed relevant to this requirement, which is subject to review by the MBE Liaison. Documentation of Good Faith and Outreach Efforts must be submitted with the bid, regardless of the proposed level of SBEs, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs participation in the procurement. If the Good Faith and Outreach Effort Form and associated documentation is not submitted with the bid response, the bid may be rejected.

The undersigned acknowledges that all information is accurate. Any misrepresentations may result in termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and claims.

Company

Date

Company Representative

Title

GENERAL PROVISIONS

1. Each Respondent shall comply with all Federal, State & Local regulations concerning this type of service or good.

The Respondent agrees to comply with all statutes, rules, and regulations governing safe and healthful working conditions, including the Occupational Health and Safety Act of 1970, 29 U.S.C. 650 *et. seq.*, as amended, and KRS Chapter 338. The Respondent also agrees to notify the LFUCG in writing immediately upon detection of any unsafe and/or unhealthful working conditions at the job site. The Respondent agrees to indemnify, defend and hold the LFUCG harmless from all penalties, fines or other expenses arising out of the alleged violation of said laws.

2. Failure to submit ALL forms and information required in this RFP may be grounds for disqualification.
3. Addenda: All addenda and IonWave Q&A, if any, shall be considered in making the proposal, and such addenda shall be made a part of this RFP. Before submitting a proposal, it is incumbent upon each proposer to be informed as to whether any addenda have been issued, and the failure to cover in the bid any such addenda may result in disqualification of that proposal.
4. Proposal Reservations: LFUCG reserves the right to reject any or all proposals, to award in whole or part, and to waive minor immaterial defects in proposals. LFUCG may consider any alternative proposal that meets its basic needs.
5. Liability: LFUCG is not responsible for any cost incurred by a Respondent in the preparation of proposals.
6. Changes/Alterations: Respondent may change or withdraw a proposal at any time prior to the opening; however, no oral modifications will be allowed. Only letters, or other formal written requests for modifications or corrections of a previously submitted proposal which is addressed in the same manner as the proposal, and received by LFUCG prior to the scheduled closing time for receipt of proposals, will be accepted. The proposal, when opened, will then be corrected in accordance with such written request(s), provided that the written request is contained in a sealed envelope which is plainly marked "modifications of proposal".
7. Clarification of Submittal: LFUCG reserves the right to obtain clarification of any point in a bid or to obtain additional information from a Respondent.
8. Bribery Clause: By his/her signature on the bid, Respondent certifies that no employee of his/hers, any affiliate or Subcontractor, has bribed or attempted to bribe an officer or employee of the LFUCG.

9. Additional Information: While not necessary, the Respondent may include any product brochures, software documentation, sample reports, or other documentation that may assist LFUCG in better understanding and evaluating the Respondent's response. Additional documentation shall not serve as a substitute for other documentation which is required by this RFP to be submitted with the proposal,
10. Ambiguity, Conflict or other Errors in RFP: If a Respondent discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, it shall immediately notify LFUCG of such error in writing and request modification or clarification of the document if allowable by the LFUCG.
11. Agreement to Bid Terms: In submitting this proposal, the Respondent agrees that it has carefully examined the specifications and all provisions relating to the work to be done attached hereto and made part of this proposal. By acceptance of a Contract under this RFP, proposer states that it understands the meaning, intent and requirements of the RFP and agrees to the same. The successful Respondent shall warrant that it is familiar with and understands all provisions herein and shall warrant that it can comply with them. No additional compensation to Respondent shall be authorized for services or expenses reasonably covered under these provisions that the proposer omits from its Proposal.
12. Cancellation: If the services to be performed hereunder by the Respondent are not performed in an acceptable manner to the LFUCG, the LFUCG may cancel this contract for cause by providing written notice to the proposer, giving at least thirty (30) days notice of the proposed cancellation and the reasons for same. During that time period, the proposer may seek to bring the performance of services hereunder to a level that is acceptable to the LFUCG, and the LFUCG may rescind the cancellation if such action is in its best interest.

A. Termination for Cause

- (1) LFUCG may terminate a contract because of the contractor's failure to perform its contractual duties
- (2) If a contractor is determined to be in default, LFUCG shall notify the contractor of the determination in writing, and may include a specified date by which the contractor shall cure the identified deficiencies. LFUCG may proceed with termination if the contractor fails to cure the deficiencies within the specified time.
- (3) A default in performance by a contractor for which a contract may be terminated shall include, but shall not necessarily be limited to:
 - (a) Failure to perform the contract according to its terms, conditions and specifications;
 - (b) Failure to make delivery within the time specified or according

- to a delivery schedule fixed by the contract;
- (c) Late payment or nonpayment of bills for labor, materials, supplies, or equipment furnished in connection with a contract for construction services as evidenced by mechanics' liens filed pursuant to the provisions of KRS Chapter 376, or letters of indebtedness received from creditors by the purchasing agency;
- (d) Failure to diligently advance the work under a contract for construction services;
- (e) The filing of a bankruptcy petition by or against the contractor; or
- (f) Actions that endanger the health, safety or welfare of the LFUCG or its citizens.

B. At Will Termination

Notwithstanding the above provisions, the LFUCG may terminate this contract at will in accordance with the law upon providing thirty (30) days written notice of that intent, Payment for services or goods received prior to termination shall be made by the LFUCG provided these goods or services were provided in a manner acceptable to the LFUCG. Payment for those goods and services shall not be unreasonably withheld.

13. Assignment of Contract: The contractor shall not assign or subcontract any portion of the Contract without the express written consent of LFUCG. Any purported assignment or subcontract in violation hereof shall be void. It is expressly acknowledged that LFUCG shall never be required or obligated to consent to any request for assignment or subcontract; and further that such refusal to consent can be for any or no reason, fully within the sole discretion of LFUCG.
14. No Waiver: No failure or delay by LFUCG in exercising any right, remedy, power or privilege hereunder, nor any single or partial exercise thereof, nor the exercise of any other right, remedy, power or privilege shall operate as a waiver hereof or thereof. No failure or delay by LFUCG in exercising any right, remedy, power or privilege under or in respect of this Contract shall affect the rights, remedies, powers or privileges of LFUCG hereunder or shall operate as a waiver thereof.
15. Authority to do Business: The Respondent must be a duly organized and authorized to do business under the laws of Kentucky. Respondent must be in good standing and have full legal capacity to provide the services specified under this Contract. The Respondent must have all necessary right and lawful authority to enter into this Contract for the full term hereof and that proper corporate or other action has been duly taken authorizing the Respondent to enter into this Contract. The Respondent will provide LFUCG with a copy of a corporate resolution authorizing this action and a letter from an attorney confirming that the proposer is authorized to do business in the State of Kentucky if requested. All proposals must

be signed by a duly authorized officer, agent or employee of the Respondent.

16. **Governing Law:** This Contract shall be governed by and construed in accordance with the laws of the Commonwealth of Kentucky. In the event of any proceedings regarding this Contract, the Parties agree that the venue shall be the Fayette County Circuit Court or the U.S. District Court for the Eastern District of Kentucky, Lexington Division. All parties expressly consent to personal jurisdiction and venue in such Court for the limited and sole purpose of proceedings relating to this Contract or any rights or obligations arising thereunder. Service of process may be accomplished by following the procedures prescribed by law.
17. **Ability to Meet Obligations:** Respondent affirmatively states that there are no actions, suits or proceedings of any kind pending against Respondent or, to the knowledge of the Respondent, threatened against the Respondent before or by any court, governmental body or agency or other tribunal or authority which would, if adversely determined, have a materially adverse effect on the authority or ability of Respondent to perform its obligations under this Contract, or which question the legality, validity or enforceability hereof or thereof.
18. Contractor understands and agrees that its employees, agents, or subcontractors are not employees of LFUCG for any purpose whatsoever. Contractor is an independent contractor at all times during the performance of the services specified.
19. If any term or provision of this Contract shall be found to be illegal or unenforceable, the remainder of the contract shall remain in full force and such term or provision shall be deemed stricken.
20. Contractor [or Vendor or Vendor's Employees] will not appropriate or make use of the Lexington-Fayette Urban County Government (LFUCG) name or any of its trade or service marks or property (including but not limited to any logo or seal), in any promotion, endorsement, advertisement, testimonial or similar use without the prior written consent of the government. If such consent is granted LFUCG reserves the unilateral right, in its sole discretion, to immediately terminate and revoke such use for any reason whatsoever. Contractor agrees that it shall cease and desist from any unauthorized use immediately upon being notified by LFUCG.

Signature

Date

**RISK MANAGEMENT PROVISIONS
INSURANCE AND INDEMNIFICATION**

INDEMNIFICATION AND HOLD HARMLESS PROVISION

- (1) It is understood and agreed by the parties that Contractor hereby assumes the entire responsibility and liability for any and all damages to persons or property caused by or resulting from or arising out of any act or omission on the part of Contractor or its employees, agents, servants, owners, principals, licensees, assigns or subcontractors of any tier (hereinafter "CONTRACTOR") under or in connection with this agreement and/or the provision of goods or services and the performance or failure to perform any work required thereby.
- (2) CONTRACTOR shall indemnify, save, hold harmless and defend the Lexington-Fayette Urban County Government and its elected and appointed officials, employees, agents, volunteers, and successors in interest (hereinafter "LFUCG") from and against all liability, damages, and losses, including but not limited to, demands, claims, obligations, causes of action, judgments, penalties, fines, liens, costs, expenses, interest, defense costs and reasonable attorney's fees that are in any way incidental to or connected with, or that arise or are alleged to have arisen, directly or indirectly, from or by CONTRACTOR's performance or breach of the agreement and/or the provision of goods or services provided that: (a) it is attributable to personal injury, bodily injury, sickness, or death, or to injury to or destruction of property (including the loss of use resulting therefrom), or to or from the negligent acts, errors or omissions or willful misconduct of the CONTRACTOR; and (b) not caused solely by the active negligence or willful misconduct of LFUCG.
- (3) In the event LFUCG is alleged to be liable based upon the above, CONTRACTOR shall defend such allegations and shall bear all costs, fees and expenses of such defense, including but not limited to, all reasonable attorneys' fees and expenses, court costs, and expert witness fees and expenses, using attorneys approved in writing by LFUCG, which approval shall not be unreasonably withheld.
- (4) These provisions shall in no way be limited by any financial responsibility or insurance requirements, and shall survive the termination of this agreement.
- (5) LFUCG is a political subdivision of the Commonwealth of Kentucky. CONTRACTOR acknowledges and agrees that LFUCG is unable to provide indemnity or otherwise save, hold harmless, or defend the CONTRACTOR in any manner.
- (6) Notwithstanding, the foregoing with respect to any professional services performed by CONTRACTOR hereunder (and to the fullest extent permitted by law), CONTRACTOR shall indemnify, save, hold harmless and defend LFUCG from and against any and all liability, damages and losses, including but not limited to, demands, claims, obligations, causes of action, judgments, penalties, fines, liens, costs, expenses, interest, defense costs and reasonable attorney's fees, for any damage due to death or injury to any person or injury to any property (including the loss of use resulting therefrom) to the extent arising out of, pertaining to or relating to the negligence, recklessness or willful misconduct of CONTRACTOR in the performance of this agreement.

FINANCIAL RESPONSIBILITY

BIDDER/CONTRACTOR understands and agrees that it shall demonstrate the ability to assure compliance with the above Indemnity provisions and these other risk management provisions prior to final acceptance of its bid and the commencement of any work or provision of goods.

INSURANCE REQUIREMENTS

YOUR ATTENTION IS DIRECTED TO THE INSURANCE REQUIREMENTS BELOW, AND YOU MAY NEED TO CONFER WITH YOUR INSURANCE AGENTS, BROKERS, OR CARRIERS TO DETERMINE IN ADVANCE OF SUBMISSION OF A RESPONSE THE AVAILABILITY OF THE INSURANCE COVERAGES AND ENDORSEMENTS REQUIRED HEREIN. IF YOU FAIL TO COMPLY WITH THE INSURANCE REQUIREMENTS BELOW, YOU MAY BE DISQUALIFIED FROM AWARD OF THE CONTRACT.

Required Insurance Coverage

BIDDER/CONTRACTOR shall procure and maintain for the duration of this contract the following or equivalent insurance policies at no less than the limits shown below and cause its subcontractors to maintain similar insurance with limits acceptable to LFUCG in order to protect LFUCG against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by CONTRACTOR. The cost of such insurance shall be included in any bid:

<u>Coverage</u>	<u>Limits</u>
General Liability (Insurance Services Office Form CG 00 01)	\$1 million per occurrence, \$2 million aggregate or \$2 million combined single limit
Auto Liability	\$1 million per occurrence
Worker's Compensation	Statutory
Employer's Liability	\$100K
Professional (E&O) Liability	\$1 million per claim

The policies above shall contain the following conditions:

- a. All Certificates of Insurance forms used by the insurance carrier shall be properly filed and approved by the Department of Insurance for the Commonwealth of Kentucky (DOI). LFUCG shall be named as an additional insured in the General Liability Policy and Commercial Automobile Liability Policy using the Kentucky DOI approved forms.
- b. The General Liability Policy shall be primary to any insurance or self-insurance retained by LFUCG.
- c. LFUCG shall be provided at least 30 days advance written notice via certified mail, return receipt requested, in the event any of the required policies are canceled or non-renewed.
- d. Said coverage shall be written by insurers acceptable to LFUCG and shall be in a form acceptable to LFUCG. Insurance placed with insurers with a rating classification of no less than Excellent (A or A-) and a financial size category of no less than VIII, as defined by the most current Best's Key Rating Guide shall be deemed automatically acceptable.

Renewals

After insurance has been approved by LFUCG, evidence of renewal of an expiring policy must be submitted to LFUCG, and may be submitted on a manually signed renewal endorsement form. If the policy or carrier has changed, however, new evidence of coverage must be submitted in accordance with these Insurance Requirements.

Deductibles and Self-Insured Programs

IF YOU INTEND TO SUBMIT A SELF-INSURANCE PLAN IT MUST BE FORWARDED TO LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT, DIVISION OF RISK MANAGEMENT, 200 EAST MAIN STREET, LEXINGTON, KENTUCKY 40507 NO LATER THAN A MINIMUM OF FIVE (5) WORKING DAYS PRIOR TO THE RESPONSE DATE. Self-insurance programs, deductibles, and self-insured retentions in insurance policies are subject to separate approval by Lexington-Fayette Urban County Government's Division of Risk Management, upon review of evidence of BIDDER/CONTRACTOR's financial capacity to respond to claims. Any such programs or retentions must provide LFUCG with at least the same protection from liability and defense of suits as would be afforded by first-dollar insurance coverage

Safety and Loss Control

CONTRACTOR shall comply with all applicable federal, state, and local safety standards related to the performance of its works or services under this Agreement and take necessary action to protect the life, health and safety and property of all of its personnel on the job site, the public, and LFUCG.

Verification of Coverage

BIDDER/CONTRACTOR agrees to furnish LFUCG with all applicable Certificates of Insurance signed by a person authorized by the insurer to bind coverage on its behalf prior to final award, and if requested, shall provide LFUCG copies of all insurance policies, including all endorsements.

Right to Review, Audit and Inspect

CONTRACTOR understands and agrees that LFUCG may review, audit and inspect any and all of its records and operations to insure compliance with these Insurance Requirements.

DEFAULT

BIDDER/CONTRACTOR understands and agrees that the failure to comply with any of these insurance, safety, or loss control provisions shall constitute default and that LFUCG may elect at its option any single remedy or penalty or any combination of remedies and penalties, as available, including but not limited to purchasing insurance and charging BIDDER/CONTRACTOR for any such insurance premiums purchased, or suspending or terminating the work.

**Lexington-Fayette Urban
County Government**

Lexington Parks and Recreation
Phase I Park System Master Plan Consultant

**Request for Proposal
32-2025**

September 8, 2025

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6.1 Exhibit A – Park System Master Plan Phase II Objectives

1.0 Introduction

The City of Lexington is a mid-sized University city (University of Kentucky) in the heart of the Bluegrass in Central Kentucky at the crossroads of I-75 and I-64. The City and County merged in 1972, and the Division of Parks and Recreation was created in the Charter. Since that time, the Division of Parks and Recreation and Lexington's park system have grown substantially. With 110 parks and community trails, 4,500 acres of green space, 90 miles of trails, 147 courts, 12 aquatics facilities, 5 golf courses, 5 community centers, 4 natural area parks, 2 arts centers, and much more, our Parks System is anything but mid-sized.

In its nearly 50 years of existence, the division has grown as well, with 150 civil service employees and often swelling over 800 employees in the Summer. In 2024, programming and camps included: 1,004 total programs, 12,007 Natural Area program participants, 61,036 Community Center visits, 33,568 patrons at Pam Miller Downtown Arts Center, 8,046 Golf Tournament participants, 3,927 Before and After School program participants, 2,583 volunteers activated, 1,897 Therapeutic Recreation participants, 892 swim lessons and team participants, and 300k+ served annually at 175+ days of Parks Events.

Parks Master Plans were created in 1996 and 2008. The latest Parks Master Plan was developed in 2018 with a tremendous amount of input from the community. Through this process as well as with the Strategic Plan update in 2024, Lexington Parks and Recreation's Vision, Mission and Values were developed.

- Vision – Inspire imagination and exploration
- Mission – Build community and enrich life through parks, programs, and play
- Values – Community, Stewardship, Inclusion, Collaboration, and Innovation

Lexington Parks and Recreation has been accredited by the Commission for Accreditation of Park and Recreation Agencies (CAPRA) since 2007 and is one of only two agencies in Kentucky. In 2024, Lexington Parks and Recreation was a National Gold Medal Award finalist, top four in Class II (population 150,001 – 400,000). The award, governed by the American Academy for Park and Recreation Administration (AAPRA) in partnership with the National Recreation and Park Association (NRPA), honors public park and recreation agencies and state park systems throughout the United States that demonstrate excellence in long-range planning, resource management and innovative approaches.

In 2024, after 20 years of work by the Lexington Parks Advisory Board, a dream was realized of sustainable funding for parks, when 61% of the community voted in favor of the Park Fund (\$8M a year of funding with no sunset). The Park Fund will be available to expense in January of 2026.

The goal of this Master Plan is to assist Lexington Parks and Recreation to develop a 10-year plan to continue providing dynamic, creative and responsive services and facilities, as well as provide recommendations for capital investment consistent with Park Fund Policy: [Park Fund | City of Lexington, Kentucky](https://www.lexingtonky.gov/parks-administration/park-fund) (www.lexingtonky.gov/parks-administration/park-fund)

2.0 Scope

2.1 Overview and Project Timeline

Lexington Parks and Recreation is seeking a consulting team to develop a system-wide parks and recreation master plan update in two phases.

The primary focus of Phase I is innovative community analysis and meaningful stakeholder engagement. Stakeholders are defined as all residents of Fayette County as well as residents of surrounding counties who utilize city parks and programming. Phase I deliverables shall include, at minimum, a report detailing all research and discoveries from the community analysis and a summary of all findings from stakeholder engagement. Information gathered in Phase I will inform Phase II of the Park System Master Plan.

Phase II the development of a 10-year comprehensive parks and recreation system master plan that responds to information gathered in Phase I as well as the objectives listed in RFP#XX-2025 Appendix A.

Target dates for this project are:

- February 2026 – Phase I begins
- February 2026 - Summer 2026 - Phase II begins as soon as Phase II funding is received
- Fall 2026 - Phase I complete
- No later than January 2028 – Draft Parks and Recreation Master Plan complete

2.2 Scope Details

2.2.1 Phase I Community Analysis shall include, but not be limited to, the following:

- Community Inventory (per CAPRA 10.5.2)
- National, regional and local recreation and leisure trends analysis (per CAPRA 10.5.1)
- Needs assessment (per CAPRA 10.4)
- Level of service analysis
- Benchmarking analysis with examples of similar cities and park systems
- Trust for Public Land Parkscore and National Recreation and Park Association Parkmetrics score analysis
- Determine current level of local park and program utilization and identify possible barriers to utilization
- Park and programming market analysis (inventory of other private, public and non-profit park and recreation services available in Lexington-Fayette County and the surrounding region)
- Community demographics and projections analysis
- Establish Level of Service Standards (per CAPRA 10.3.1)
- Identify gaps in service

2.2.2 Phase I Stakeholder Engagement Survey(s) Consultant/Consultant Team shall explain in their proposal how they will design and implement a statistically valid community survey to inform the Lexington Parks and Recreation Master Plan. The proposed survey methodology should address:

- The minimum number of completed responses expected and confidence level with margin of error
- How demographic and geographic representativeness will be achieved relative to age, race/ethnicity, income, zip code, etc.
- What random or stratified sampling methodology will be employed with weighting as needed to correct imbalances

- What type of multilingual access and equitable outreach to historically underrepresented groups will be used
- Explain what survey method(s) will be employed (mail, phone, online, other)
- Share an example of what type of publicly shareable summary report and/or interactive dashboard can be expected
- Propose what final survey deliverables can be expected (raw data, methodology documentation, response rate analysis, data reliability assessment, explanation of limitations, etc.)

2.2.3 Phase I Stakeholder Engagement Meetings

Consultant teams shall include leading the following specific stakeholder meetings:

- Meetings with Executive Committee - Minimum of 2; choice of in-person or virtual
- Conversations with City Administration – Minimum of 4; choice of in-person or virtual
- Conversations with City Council Members – Minimum of 3; choice of in-person or virtual
- Community Conversations - Public open house meetings; minimum of 4; in person
- Stakeholder Meetings – Focus group meetings; minimum of 20; choice of in-person or virtual; Parks staff will be available attend in-person if Consultant/Consultant Team attends virtually
- Event Engagement – The number and exact events to be determined after survey to capture input from any demographic not well represented. Consultants need not plan to staff every engagement; Parks and Recreation employees will also be available to staff events that the Consultant recommends.

2.2.4 Phase I Presentation of Findings

At the conclusion of Phase I, Consultants shall present Community Analysis and Stakeholder Engagement findings to:

- The Executive Committee (in-person or virtual)
- Lexington Parks and Recreation Staff (virtual live or recorded)
- Parks Advisory Board (in-person or virtual)
- Mayor, Administration and City Council (in-person)

2.2.5 Phase II Detailed Scope

The Parks and Recreation Master Plan shall achieve the objectives provided in **RFP#32-2025 APPENDIX Exhibit A**. The list provided does not limit the scope of the plan to only these objectives, undertaking these tasks or answering these specific questions. Expert Consultants are welcome to suggest other areas of research, analysis and stakeholder engagement or plan objectives to include in their proposals based on the Consultant's past park master plan experience or particular expertise with innovation and public engagement.

At a minimum, it is expected the final plan should include chapters covering these distinct topics:

- Executive Summary
- Phase I Community Analysis Summary and Findings
- Needs Assessment / Identifying Service Gaps and Access Needs
- Phase I Stakeholder Engagement Summary and Findings
- Policy Overview and Recommendations for new/revised policies
- Strategic Plan
- Administration and Management recommendations
- Sustainability and Environmental resilience recommendations
- Technology and Innovation recommendations
- Programs and Services recommendations
- Inventory and Condition of Existing Park and Recreation Facilities
- Park Classification & Standards
- Maintenance and Operations recommendations
- Park and Recreation Facility recommendations

- Park Fund Leverage Strategies and Balanced Investment recommendations
- Parkland Acquisition and Development recommendations
- Staff Action Plan

2.2.6 Phase II Meetings

Consultants should include in their scope attending periodic meetings with the Executive Committee. The timing and number of meetings will depend on Consultant Team's approach and proposed detailed timeline. These meetings can be virtual or in-person.

2.2.7 Phase II Presentation of Final Master Plan Overview

At the conclusion of Phase II, Consultants shall present the Parks and Recreation Master Plan overview to:

- The Executive Committee (virtual or in-person)
- Lexington Parks and Recreation Staff (virtual live or recorded)
- Parks Advisory Board (virtual or in-person)
- Mayor, Administration and City Council (in-person)

3.0 Consultant Response Instructions

Proposals should be responsive to the guidance provided in this Request for Proposals by containing all requested information described in the sections below. LFUCG reserves the right to eliminate any response from consideration at their discretion. Proposals should be concise, factual and facilitate understanding of the Consultant Team's approach.

3.1 Transmittal Letter

Each Consultant Team will submit a cover letter of transmittal, stipulating the following:

- The signer of the letter has sufficient authority to commit the company to its proposal
- The Consultant agrees to the scope, terms and conditions of this RFP. Any exceptions must be described
- The identity and title of the Consultant's authorized representative to negotiate fees
- LFUCG will have ownership of the proposed Deliverables
- A lump sum base bid for Phase I and a separate lump sum base bid for Phase II Commitment that the fee for Phase II will be valid until 8/30/26

3.2 Executive Summary

Each Consultant Team shall provide an executive summary of recommended approach for developing a parks and recreation system master plan that will deliver all stated outcomes. Identify the unique value your firm or team would bring to the project and how the team's specific expertise aligns with the creation of the desired plan.

3.3 Consultant Team Business Profiles and References

Please provide a brief, general business profile for each firm included on the Consultant Team along with 5 references for similar projects completed within the last 10 years. Also include a professional qualifications and experience for each proposed team member (not to exceed one page per team member).

3.4 Proposed Approach

Proposals should include a detailed description of the approach and rationale to be used to accomplish each portion of the scope of services. They should explain any tasks, resources and information the Owner is expected to provide to complete the plan.

3.5 Schedule

Proposals should expand upon the Project Timeline target dates provided in section 2.0 inserting all anticipated project milestones and the estimated number of weeks to complete each milestone.

3.6 Deliverables

3.6.1 Phase I deliverables shall include a report in PDF file format for printing. It shall include the following:

- Executive Summary (also formatted for website)
- Summary of Community Analysis Methodology
- Community Analysis Findings
- Summary of Stakeholder Engagement Methodology
- Stakeholder Engagement Findings
- Appendix with all data collected

The Consultant Team should also deliver to Owner:

- All spreadsheets in separate, Excel files

- Graphic files in high resolution format for any logos created to represent the project
- All GIS shapefiles created to produce maps
- All requested photographs specifically collected as part of the project (JPEG format)

3.6.2 Phase II deliverables shall include a Parks and Recreation Master Plan in PDF file format for printing which includes but is not limited to the chapters outlined in section 2.2.5.

The Consultant Team should also deliver:

- All spreadsheets in separate, Excel files so they can be updated over the life of the plan, specifically any type of individual park recommendations or staff action plan, strategic plan tasks, etc. that will be reviewed and tracked over time to check completion rate.
- Graphic files in high resolution format for any logos created to represent the project
- All GIS shapefiles created to produce maps
- All requested photographs specifically collected as part of the project (JPEG format)

3.7 Assumptions and Constraints

Please supply any assumptions on which your approach and fees are based, along with any constraints you are aware of in the RFP Response Template.

3.8 Pricing Matrix

The Consultant Team shall provide a lump sum price for Phase I and a separate Additive Alternate lump sum price for Phase II of this work, as well as a list of hourly rates for all team members. Should work outside of this scope be requested, the hourly rates will be used to determine the fee based upon the agreed upon number of hours required for the requested task.

Consultant Services	Lump Sum Fee
1a. Parks and Recreation Master Plan Phase I - Community Analysis	\$
1b. Parks and Recreation Master Plan Phase I - Stakeholder Engagement	\$
1c. Parks and Recreation Master Plan Phase I – Presentation and Final Deliverables	\$
Phase I Base Bid Subtotal	
2a. Parks and Recreation Master Plan Phase II – 25% Scope Complete	
2b. Parks and Recreation Master Plan Phase II – 50% Scope complete	
2c. Parks and Recreation Master Plan Phase II – 75% Scope complete	
2d. Parks and Recreation Master Plan Phase II – 100% Scope complete	\$
Additive Alternate Phase II Subtotal	\$
Phase I Base Bid and Additive Alternate Phase II Total	\$

4.0 Consultant Selection Process

4.1 Proposal Scoring Criteria

All valid RFP responses will be evaluated by a Selection Committee and assigned a composite score using the following criteria:

1. Professional qualifications and experience of the team (15 points)
2. The specificity of the RFP response as related to stated scope and objectives (15 points)
3. Level of creativity, innovation and relevance of proposed approaches to scope of work (25 points)
4. Quantity and quality of previous park master plan work and references (20 points)
5. Adherence to budget and timeline on previous contracts with LFUCG or other public agencies and municipalities (15 points)
6. Cost of Services (10 points)

4.2 Consultant Selection Process Detail

4.2.1 Phase I Consultant Selection Process

A minimum of three (3) Consultant Teams with the highest scores will be invited to a virtual interview with the selection committee. Topics to be discussed or questions to be asked by selection committee members will be sent with meeting confirmation to allow Consultants to adequately prepare. Following interviews, committee members will select one Consultant/Consultant Team who will be offered the contract for Phase I of the Park System Master Plan.

4.2.2 Phase II Consultant Selection Process

Phase II shall be awarded to the same Consultant Team selected for Phase I using the Additive Alternate lump sum price as soon as funding becomes available.

4.3 Anticipated Consultant Selection Timeline Project Timeline

- September 2025 – RFP Advertised
- October 2025 – Consultant Proposals Due, Initial Interview
- November 2025 – Finalist Interviews
- December 2025 – Consultant Selected
- January 2026 – City Council Approval of Contract
- February 2026– Notice to Proceed

5.0 Owner's Responsibilities

Lexington Parks and Recreation shall:

- Provide a primary project contact
- Provide currently existing data in formats available
- Accept the final negotiated plan to signify agreement with the planned approach and deliverables
- Authorize payment at the agreed upon intervals to indicate completion of each portion of the scope of work
- Accept the project deliverables to indicate final completion of the scope of work

6.0 RFP#32-2025 APPENDIX

6.1 Exhibit A - Park System Master Plan Phase II Objectives

6.1.1 Parks Administration

- Evaluate and if needed, update agency Mission, Vision, Values (per CAPRA 1.4)
- Evaluate and if needed, update agency goals and objectives (per CAPRA 1.4.1)
- Goals and objectives shall be measurable to demonstrate progress
- Include recommendations for systematic approaches to leverage Park Fund
- Update the agency's Strategic Plan as a discrete chapter within the Master Plan which states how the agency will achieve the new mission, goals and objectives and support the agency's priorities and initiatives over the next 5 years
- Insure final Strategic and Master Plans comply with CAPRA requirements
- Reference the updated Lexington-Fayette Urban County Government ADA Transition Plan in the Master Plan
- Recommend balanced, phased capital improvement program priorities based on Park Fund budget and other funding opportunities.

6.1.2 Parks Enterprise

6.1.2.1 Rentals

- Evaluate the market demand for indoor athletic and recreation facilities. If demand is not being met, offer recommendations on what type and size facilities would meet demand over the next 10-20 years.
- Evaluate market demand for event (large and small) venue space. If demand not being met, provide recommendations for what type and size of indoor venue is needed.

6.1.2.2 Aquatics

- Evaluate whether or not existing aquatic facilities are currently meeting market demand/per capita standards, if more aquatic facilities will be needed, include recommendations for location and type.
- Based on trends, recommend what types of aquatics programming the public may be interested in over the next 10 years.

6.1.2.3 Golf

- Evaluate each golf facility and provide prioritized recommendations for capital improvements needed.
- Evaluate market demand for golf programming and make recommendations for amount and type of programming needed.
- Evaluate the cost to play each golf course with local market and advise if fees are commensurate with the quality of the golf courses.
- Evaluate current environmental practices and make recommendations for additional opportunities for sustainability/climate resilience.

6.1.3 Parks Recreation

Identify Trends and Best Practices in the following areas:

- Data collection and analysis, including application of AI tools
- Marketing and information reporting strategies and communication tools
- Programming and Management of
 - Historically significant spaces
 - Natural Areas and naturalized park spaces
 - Recreational outreach programs
 - Engagement and volunteering for all ages, youth, young adults, adults, and seniors

6.1.4 Parks Maintenance

- Based on best practices of similarly sized park agencies, recommend standards for service delivery to support special events.
- Recommend innovative technology currently being used in the parks and recreation industry that could improve the efficiency of park maintenance operations.
- Based on best practices from other parks and recreation agencies, recommend policies and procedures for transparent, efficient and responsible community building management performed by community members outside the parks and recreation agency.
- Best practices of other similarly sized park systems for safety and security of parks and facilities

6.1.5 Planning and Design

- Identify parkland acquisition priorities including newest Urban Service Boundary Expansion Areas.
- Identify opportunities for park planning and design innovation and improved sustainability.
- Incorporate TPL Park Equity Accelerator findings in the Master Plan.
- Include recommendations for Capital Asset Management (inspection schedule; capital repair schedule based on expected life, etc.).
- Provide industry best practice standards for quantity and quality of park/open space.
- Inventory and condition of existing park and recreation facilities with recommendations for prioritized capital improvement need.

EXHIBIT "B"

Consultant Proposal

LEXINGTON-FAYETTE URBAN COUNTY GOVERNMENT

PARKS AND RECREATION MASTER PLAN

REQUEST FOR PROPOSAL #32-2025
OCTOBER 8, 2025



LEXINGTON



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1 Letter of Transmittal

October 8, 2025

Lexington-Fayette Urban County Government
200 East Main Street,
Lexington, Tennessee 40507

Dear Lexington- Fayette Urban County Government Selection Committee,

This is an exciting and transformative moment for the Lexington-Fayette Urban County Government (LFUCG) as it embarks on updating its Parks and Recreation Master Plan. Since the completion of the last plan in 2018, the LFUCG has experienced significant change—most notably, a post-COVID social awakening that has elevated public awareness of the essential role parks and green spaces play in community health and well-being.

Today, more residents recognize that parks, trails, and robust recreational programming are not simply “nice-to-have” amenities—they are critical infrastructure. LFUCG has responded to this growing demand with bold investments: first through ARPA funding, then with the establishment of the Parks Fund in 2024, and most recently through innovative public-private partnerships such as Gatton Park and Kelley’s Landing.

This renewed public interest aligns with national trends in parks and recreation planning, including:

- Ensuring every resident lives within a 10-minute walk of a park,
- Leveraging trail corridors for expanded recreation access,
- Creating High-Performance Public Spaces (HPPS),
- And integrating emerging technologies like Artificial Intelligence (AI) to enhance planning and operations.

The upcoming Master Plan presents a unique opportunity to build on these local and national initiatives. It should engage a broad and diverse group of stakeholders, explore a wide range of recreational programs, and prioritize sustainable operations. It should also align with other strategic efforts such as Imagine Lexington, the Urban Growth Management & Preservation Plan, the Greenway Management Plan, the Downtown Master Plan, and Reimagining the Civic Commons.

We understand the importance of designing a plan that addresses the challenges of a 21st-century city—from climate resilience and evolving transportation technologies to shifting trends in role of parks addressing community health challenges. We also recognize the LFUCG’s strong commitment to implementing this plan and delivering both immediate improvements and long-term growth for Lexington’s parks and recreation system.

For these reasons, Perez Planning + Design, LLC (PP+D) is proud to submit our qualifications for your consideration. We believe our Team—comprised of local, regional, and national experts—is uniquely positioned to partner with LFUCG on this important initiative. Our Team’s collective experience in completing over 500 comprehensive parks and recreation master plans throughout the United States, our passion, and our collaborative approach make us the ideal choice to help shape the future of Lexington’s parks and recreation system.

As President of PP+D, I, Carlos Perez, am authorized to commit our Team to this proposal and to negotiate fees on our behalf. Enclosed, you’ll find detailed information about our approach, project team, schedule, and bid. We confirm that our lump sum base bids for Phase I and Phase II are valid through August 30, 2026. We accept the scope, terms, and conditions outlined in the RFP with the included exceptions and acknowledge that LFUCG will retain ownership of all deliverables.

We welcome the opportunity to collaborate with LFUCG and its residents to develop a visionary, inclusive, and actionable Parks and Recreation Master Plan Update. We look forward to the opportunity to discuss our ideas with you in greater detail.

Sincerely,

Carlos F. Perez, PLA – President



2 Executive Summary

The Perez Planning + Design Team

The Perez Planning + Design (PP+D) Team is comprised of national, regional, and local thought leaders in all the services needed to complete the Lexington-Fayette Urban County Government (LFUCG) Parks and Recreation Master Plan.

The Team is comprised of the following award winning firms, many of which have been working together on projects similar to the LFUCG Parks and Recreation Master Plan for over 20 years:

- **Perez Planning + Design, LLC** – Parks and Recreation Master Planning
- **PROS Consulting, LLC** – Parks and Recreation Programming, Operations, and Management
- **Lord Aeck Sargent** – Parks and Recreation Capital Improvements and Landscape Architecture
- **CivicLex** – Public Engagement
- **ETC Institute** – Statistically Valid Survey
- **EHI** – Public Engagement, Equity Analysis, and Cost Estimating
- **National Golf Foundation (NGF) + Kevin H. Grave Golf Course Architect** – Golf Course Market Demand and Improvements
- **Counsilman-Hunsaker** – Aquatics Consultant
- **RMPK Funding** – Funding Alternatives

Collectively, the PP+D Team provides the LFUCG with the following benefits:

- **National Experience** - The PP+D Team brings a collective experience in completing over five-hundred (500) Parks and Recreation Master Plans throughout the United States. Five Parks and Recreation Master Plans that are highlighted in this proposal that PP+D Staff have led include the City of Knoxville, TN; City of Miami, FL; City of Atlanta, GA; Gwinnett County, GA, and District of Columbia.
- **National Expertise and Leading Practices** - The PP+D Team provides the LFUCG with firms that are leaders in their fields. For example, PP+D and PROS Consulting have collectively worked with over 40% of agencies that have been accredited by the Commission for Accreditation for Parks and Recreation Agencies (CAPRA) Accreditation and

Five PP+D Parks and Recreation Master Plans Highlighted in the Proposal



experience working with over 50% of National Gold Medal Award agencies.

PP+D and PROS Staff have served/ are currently serving on various national industry leading and academic boards and organizations - including City Parks Alliance, World Urban Parks, CAPRA, Atlanta Beltline Partnership, Park Pride, and Georgia Institute of Technology, volunteering their resources, time, energy, and experience sharing lessons learned and explore leading practices.

Counsilman-Hunsaker is a national leader in aquatics having delivered state-of-the-art aquatic facilities tailored to the needs of communities, operators, and users for over 50-years.

The National Golf Foundation (NGF) is the absolute industry authority on economics of supply and demand in the golf business authors trend leading research.

Parks and Recreation Practitioner and Consulting Experience - The PP+D Team includes a blend of parks and recreation practitioner and consulting-based experience and expertise.

Collectively, the PP+D Team brings over 60 years of combined practitioner experience from parks and recreation system including and Minneapolis Park & Recreation Board, Pittsburgh Parks Conservancy, City of Indianapolis, Lake MetroParks, and Jackson County Parks and Recreation.

Additionally, the PP+D Team brings over 150 years of combined consulting experience for agencies and



projects similar to the LFUCG Parks and Recreation Master Plan.

- **Intimate Local Knowledge and Experience** - The PP+D brings extensive local knowledge and direct experience working in Lexington and across Kentucky. Projects and initiative that the Team members EHI, LAS, and CivicLex are, or have been involved within include LFUCG Parks and Recreation Comprehensive Opportunity Assessment, Greenway Management Plan Update and Lexmark Land Planning, and Reimagining the Civic Commons.
- **Specialized Resident Engagement and Participatory Process Design Exclusively within Lexington-Fayette County** - With CivicLex, the PP+D brings hyper focused leadership in civic education, public input, and community trust-building. Each year, CivicLex covers over 400 hours of LFUCG meetings and have partnerships with 238+ local organizations that will ensure robust engagement for the LFUCG Parks and Recreation Master Plan.

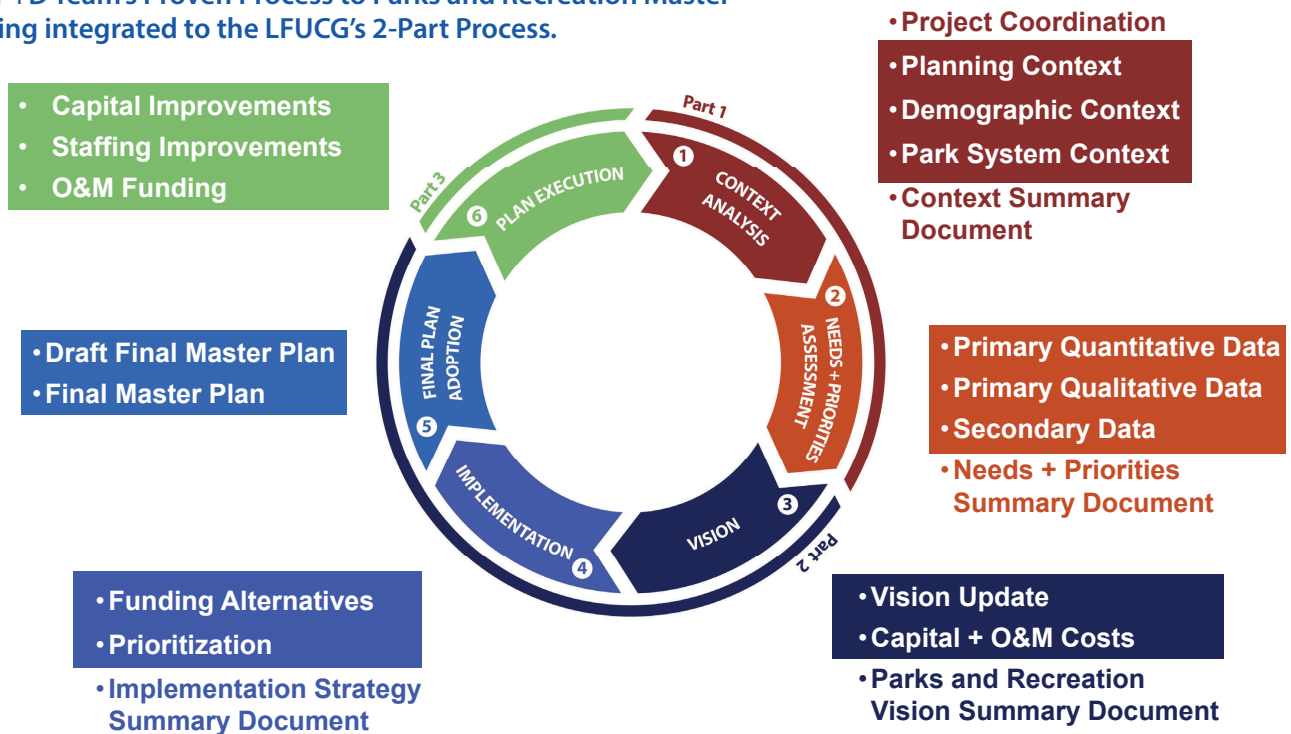
A Proven Approach to Parks and Recreation Master Plans

The PP+D Team reviewed the Scope included in the LFUCG RFP and is proposing to organize all of the LFUCGs scope items under our unique, proven process. We have refined this process over the last 20 years based on our extensive experience, which we continue to adapt to the values and needs of the communities that we work with.

The PP+D Team's process integrates seamlessly with the LFUCG's proposed two phased approach to the project. To avoid confusion in the following approach, we are rephrasing the LFUCG's desired Phase 1 and Phase 2 to Part 1 and Part 2.

We actually prefer this 2-Part Approach as it provides an opportunity to confirm identified parks and recreation needs and priorities before proceeding to discuss the LFUCG's appropriate response to the identified parks and recreation needs and priorities. Below is a diagram of how our proven phased approach aligns with the LFUCG's 2-Major Parts.

The PP+D Team's Proven Process to Parks and Recreation Master Planning integrated to the LFUCG's 2-Part Process.



The diagram illustrates the PP+D Team's primary 5 phases and their relationship to LFUCG Part 1 and Part 2. Specifically, Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment will provide the analysis and deliverables identified in the LFUCG's Part 1. Phase 3-Vision, Phase 4- Implementation, and Phase 5- Final Plan Adoption, will provide the recommendations and deliverables identified in the LFUCG's Part 2. All this work ultimately leads to a 6th Phase or a Part 3, based on the recommendations of the Plan. As illustrated by the circular shape of the diagram, in 5 to 10-years, the process starts all over again when the LFUCG updates the Parks and Recreation Master Plan.



Proposed Approach and Schedule

Following is an outline with key highlights of our proven approach that will provide all the deliverables identified in the LFUCG's Scope.

LFUCG Part 1

Phase 1: Context Analysis

- Bi-weekly project management meetings.
- Development of project branding and an interactive website.
- Kick-off meetings with staff, administration, and advisory board.
- Review of 3 key contexts:



Planned Context - Review of previous LFUCG planning studies.



Demographic Context - Review of LFUCG's existing and projected demographics.

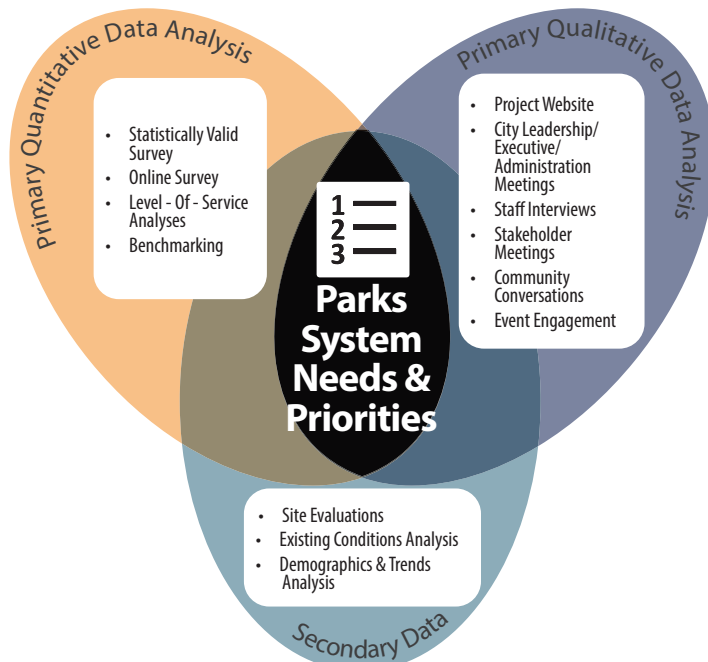


Park System Context - Assessment of the existing conditions of the parks system.

- Public launch event to build awareness and support (Potential Additional Service).*

Phase 2: Needs & Priorities Assessment

- PP+D's proven triangulated, mixed-methods approach to needs assessments - using the statistically valid survey as a baseline, where the findings from these three techniques intersect determines the priorities of the community.
- Level of Service (LOS) analyses: acreage, access, facilities, quality, funding, staffing.
- Benchmarking against NRPA and Trust for Public Land standards.



LFUCG Part 2

Phase 3: Vision

- Bi-weekly project management meetings.
- Visioning workshop with stakeholders.
- Development of a vision framework, goals, and recommendations.
- Follow-up community conversations and stakeholder meetings.

Phase 4: Implementation Strategy

- Capital and operational cost estimates.
- Funding options and prioritization strategy.
- Development of a strategic plan aligned with CAPRA standards.

Phase 5: Final Report & Adoption

- Compilation of all findings into a comprehensive master plan.
- Presentations to staff, advisory board, elected officials, and City Council.
- Final revisions and adoption.

Community Engagement Highlights

PP+D, in partnership with CivicLex and EHI Consultants, proposes a robust, inclusive, and multi-layered community engagement strategy designed to ensure meaningful participation from Lexington residents, stakeholders, and elected officials. The approach is rooted in the philosophy:

"Bring me in early, and I'm your partner. Bring me in late, and I'm your judge."

Following are key engagement components and highlights.

1. Interactive Project Website

- Developed using platforms like [PublicInput.com](https://publicinput.com) or [Social Pinpoint](https://socialpinpoint.com). Features include:
 - Interactive maps for residents to comment on specific locations.
 - Multilingual accessibility.
 - Surveys and feedback tools.
 - Threaded discussions for community dialogue.

2. Project Branding

- Creation of a unique project identity with logos, colors, and promotional materials.
- Used across all communications, including business cards, flyers, social media, and swag (e.g., hats, t-shirts).

3. Community Conversations (Two-Rounds)

- Up to six listening sessions held in accessible venues across Park Planning Districts.
- Open house format with interactive stations:
 - Facility and program priority exercises.
 - Funding allocation games.



- Park improvement mapping.
- Direct discussions with project leaders.

4. Stakeholder Focus Groups (Two-Rounds)

- Approximately 15 targeted sessions with diverse community groups:
 - Youth, seniors, people with disabilities, arts and culture organizations, maintenance staff, and more.
 - Includes written reflections and facilitated discussions.

5. Event Engagement Pop-Ups (Two-Rounds)

- Creative, arts-based or gamified pop-up booths at high-traffic events:
 - St. Patrick's Day Parade, Kite Fest, Friday Flicks, Fourth of July Parade, Dirt Bowl.
- Also deployed at community hubs like transit centers, grocery stores, and schools.

6. Statistically Valid Survey

- Administered by ETC Institute.
- Goal: 1,000 completed responses with 95% level of confidence and $\pm 3.1\%$ margin of error citywide and $\pm 8.0\%$ margin of error in up to 6 Park Planning Districts.
- Translated into up to 10 languages.
- Includes benchmarking and demographic cross-tabulations.

7. Online Survey

- Open to all residents not included in the statistically valid sample.
- Hosted on platforms like SurveyMonkey.
- Expands reach and captures broader community input.

8. Intercept Interviews

- Conducted during park site visits.
- Real-time feedback from park users, including families, youth, and seniors.

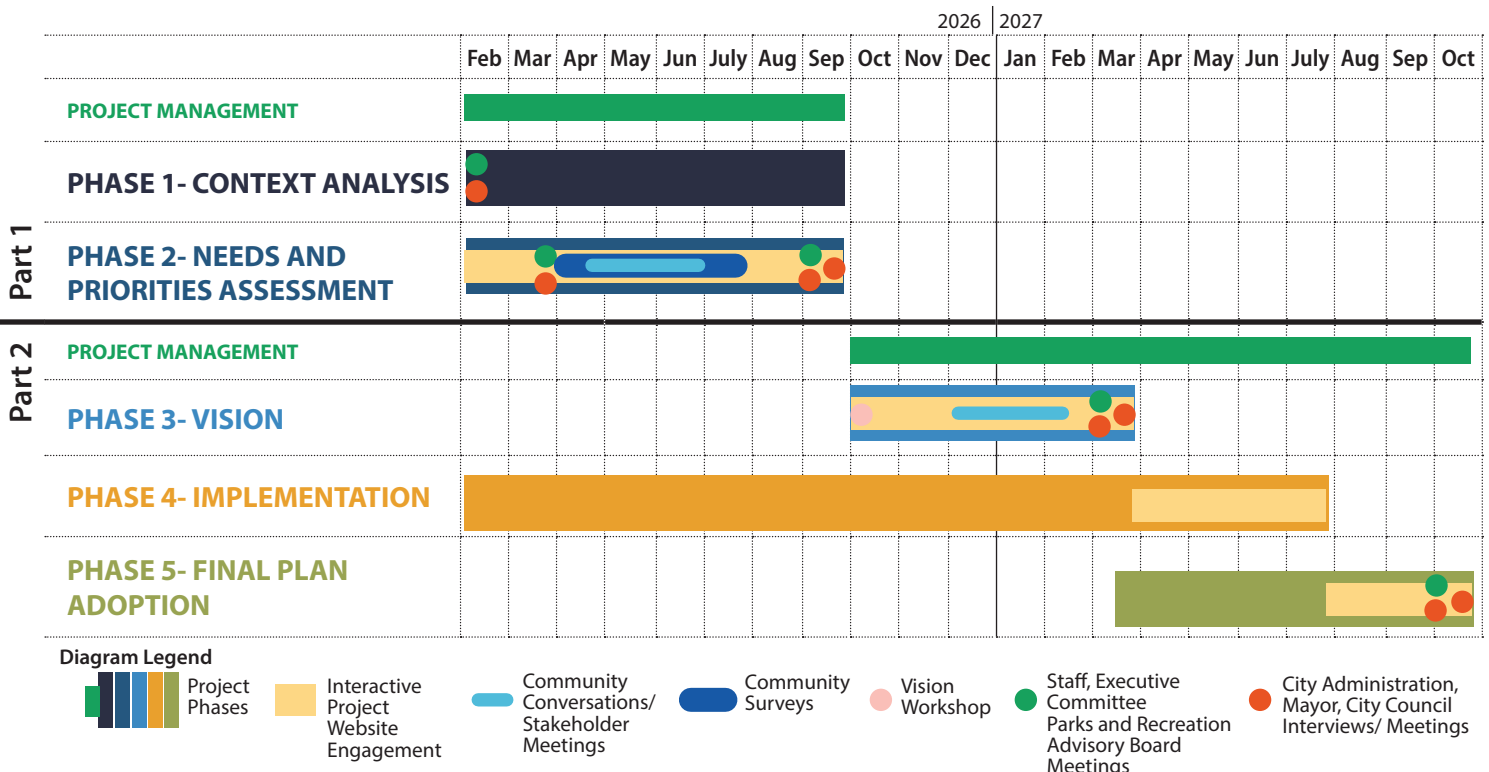
9. Visioning Workshops

- Two-day collaborative sessions with LFUCG staff and stakeholders.
- Development of goals, objectives, and strategies based on community input.

10. Presentations & One-on-One Interviews

- Regular updates and presentations to:
 - Executive Committee
 - Parks and Recreation Advisory Board
 - City Administration
 - Mayor and City Council
- One-on-one interviews with elected officials to ensure alignment and support throughout the process.

The PP+D Team understands that the LFUCG desires Part 1 of the Plan to begin February 2026 and be completed by Fall of 2026. Part 2 should commence between February 2026 and Summer 2026 as soon as funding is received and end no later than January 2028. Below is PP+D's proposed schedule to complete this project within the LFUCG's desired schedule. We are happy to revise this schedule per the LFUCG's desire.





The Perez Planning + Design (PP+D) Team is comprised of national, regional, and local thought leaders in all the services needed to complete the Lexington-Fayette Urban County Government (LFUCG) Parks and Recreation Master Plan.

With a collective experience in completing over five-hundred (500) Parks and Recreation Master Plans throughout the United States, there is no better Team that is more experienced and qualified to collaborate with the LFUCG on this important project. The team is comprised of:

- **Perez Planning + Design, LLC** – Parks and Recreation Master Planning
- **PROS Consulting, LLC** – Parks and Recreation Programming, Operations, and Management
- **Lord Aeck Sargent** – Parks and Recreation Capital Improvements and Landscape Architecture
- **CivicLex** – Public Engagement
- **ETC Institute** – Statistically Valid Survey
- **EHI** –Public Engagement, Equity Analysis, and Cost Estimating
- **National Golf Foundation (NGF) + Kevin H. Grave Golf Course Architect** – Golf Course Market Demand and Improvements
- **Counsilman-Hunsaker** – Aquatics Consultant
- **RMPK Funding** – Funding Alternatives

Following is an overview of each firm and their role in the LFUCG Parks and Recreation master Plan.

PEREZ PLANNING + DESIGN, LLC

Perez Planning + Design, LLC (PP+D) is a research-based planning and design firm that lives at the intersection of people, space, and the built and natural environment. PP+D focuses on working collaboratively with our clients and community to thoughtfully and strategically integrate these key elements to plan, design, and implement a public realm that is viable, responsive, dynamic, and resilient. Stated simply, we work collaboratively with our clients in Re+Defining the Public Realm.

PP+D is one of the leading parks and recreation master planning firms in the United States. PP+D staff have completed over 100 comprehensive parks and recreation system master plans and park planning projects for cities and counties throughout United States including Seattle, WA; Washington, D.C.; Raleigh, NC; Williamson County, TN; Germantown, TN; Atlanta, GA; Gwinnett County, GA; St. Johns County, FL; Sarasota County, FL; City of Miami, FL; and Miami-Dade County, FL, just to mention a few. Firm leader Carlos Perez regularly share their experience and expertise speaking in state and national industry conferences and serving on industry committees and organizations.

PP+D also specializes in Active-Transportation Planning and Design and has worked on a multitude of bicycle, pedestrian, trail, and greenway projects in the Southeast United States including the Atlanta BeltLine, one of the largest and highest-profile trail and economic development projects in the United States.

PP+D is also one of the lead trail planners and designers for the PATH Foundation, Inc., a non-profit organization in the Metro Atlanta area that has built over 300 miles of trails.

Since PP+D's inception, the firm has grown to seven staff with a main office in Midtown, Atlanta that focuses on parks and recreation system master planning projects similar to the LFUCG Parks and Recreation Master Plan.

PP+D is a Minority Business Enterprise (MBE), certified by the Georgia Department of Transportation and the City of Atlanta as a Hispanic American Business Enterprise and Small Business Enterprise

- Services provided by PP+D include:
- Parks and Recreation System Planning
- Parks Planning and Design
- Active-Transportation Planning + Design
- Urban Design
- Landscape Architecture

PP+D will serve as the project manager for the project and lead master planning, park planning and deliverable development tasks.



PROS Consulting is a small firm with a big presence in the field of management consulting for parks and recreation public entities and non-profit organizations. With a small team of highly professional and experienced consultants, PROS is a flexible firm that is agile to evolving dynamics of the social, economic, and political environments clients operate in. The firm's areas of focus include:

- **Master Planning** – completed over 250 master plans for parks and park systems that have been successfully implemented and driven over \$5 billion worth of capital investment.
- **Needs Assessment** – PROS has worked on over 250 parks and recreation needs assessments on projects in similar nature as this project that include market and gap analyses, as well as extensive community input to quantify opportunities in the market place desired by the community.
- **Operations, Maintenance and Organizational Development** – completed over 450 plans that involved operations, maintenance and organizational development components.
- **Financial Planning and Management** – PROS is most renowned for providing the most innovative and proven methods for financial planning and management in the public sector with direct experience with over 150 proven ways to fund public parks and park systems.
- **Feasibility Studies and Business Planning** – completed over 200 feasibility studies and business plans, often counseling our clients on how they can shape their projects and their vision around the reality of what is feasible and sustainable.
- **Customer Service Training** – completed customer service excellent training for municipalities across the country. The training is customized to each agency's goals and outcomes and range from single day work sessions to multi-year culture change processes.

PROS Consulting will lead all Parks and Recreation Operations, Management, Marketing, and Programming tasks. PROS Consulting and PP+D Team members have been working together for over 20-years on projects similar to the LFUCG Parks and Recreation Master Plan.

LORD AECK SARGENT

LORD AECK SARGENT (LAS) is one of the Southeast's premier Urban Design, Architecture and Landscape Architecture firms, specializing in public space design, mobility planning, facility planning, historic preservation, placemaking and community engagement.

LAS understands and designs outdoor spaces that complement their surrounding buildings, and vice-versa. Their communities are shaped by both the architectural quality of their buildings as well as the shared public spaces between those buildings. As part of their holistic practice for the built environment, LAS provides expertise in the design and function of dynamic open spaces, complete streets, and urban amenities. This expertise is applied across a broad range of scales and settings from multi-faceted public plazas to outdoor learning environments. Services Include:

- Urban Parks & Plazas
- Streetscapes, Pedestrian Amenities, Greenways, Multi-Use Trails, & Bikeways
- Sports & Recreation Complexes
- Green Infrastructure
- Project & Program Management & Implementation
- Strategic Planning & Master Planning
- Construction Documentation & Management
- Community Engagement.

Lord Aeck Sargent will assist with Parks and Recreation Facility Evaluations, public engagement, and capital improvement tasks. LAS and PP+D have been working together for over 10-years on parks planning and design projects.



CivicLex

CIVICLEX is a nationally-recognized civic health nonprofit that specializes in resident engagement and participatory process design. They focus exclusively on Lexington-Fayette County, Kentucky.

CivicLex has deep expertise in exploring and navigating contentious civic issues alongside governmental representatives and residents. In addition to their core work, CivicLex also partners with very select non-profit, for-profit, and governmental clients on projects in which public input is needed, prudent, and will be taken seriously. CivicLex doesn't work with clients who don't take the role of public participation seriously or will ignore public input results if they do not align with their priorities.

Since CivicLex started in 2017, over 25,000 Fayette County residents utilized their work to shape Lexington in one way or another. Each year, CivicLex's work led to well over 29,000 moments of civic education and over 350,000 moments of civic action.

CivicLex has the ability to utilize their history of community engagement and relationships for projects on which they are working. Each year, the CivicLex team watches, digests, and covers over 400 hours of LFUCG meetings. They bring priceless expertise understanding the complex dynamics of the City Government to any project they work on. Annually, they work with over 238 organizational and individuals partners to execute projects for the public good. These partnerships are rooted in mutual understanding and trust, and if appropriate, they can pull in partner organizations for collaboration on new projects.

CivicLex will lead and facilitate all resident engagement and participatory processes for the LFUCG Parks and Recreation Master Plan. They will work closely with PP+D, LAS, and EHI to design, implement, and develop summary findings from all resident engagement and participatory processes.



EHI CONSULTANTS (EHI) is an award winning 25-year-old local planning firm located in Louisville and Lexington Kentucky that has provided services to a number of communities throughout Kentucky and the Southeast Region.

EHI has a broad range of local, regional, state, and national planning experience, including developing neighborhood and comprehensive plans, subdivision regulations, and zoning ordinances. Their background includes experience in administering and implementing master and comprehensive plans through development plan review and project implementation.

EHI has been recognized by the Kentucky American Planning Association (KAPA), American Society of Landscape Architects, and the The American Association of State Highway and Transportation Officials (AASHTO) for various projects completed in Kentucky.

EHI believes in a community engagement process that has the ability to engage, excite and empower local citizens and transform communities. Their approach to community engagement is not a public relations strategy but an honest attempt to include citizens in an inclusive and participatory planning process.

EHI is staffed with accredited and professionally licensed individuals with the resources and capacity to provide a comprehensive range of planning related services. EHI has always been an accessible multi-disciplinary planning, engineering and design firm that recognizes the value of planning for a sustainable and equitable social and physical environment.

EHI will build on the Comprehensive Opportunity Assessment that they are currently working on for LFUCG Parks and Recreation and will help with existing conditions review, parks and recreation inventory and mapping, equity analysis, public engagement, and cost estimating.



ETC INSTITUTE is the absolute leading national authority on parks and recreation surveys and benchmarking. ETC has worked with PP+D Team members for over 20 years. They have conducted over 600 Parks and Recreation Surveys, and maintain a data base of over 70,000 surveys and benchmarking data bases.

ETC Institute will lead the development of the Statistically Valid Survey. ETC Institute and PP+D Team members have been working together for over 20-years on projects similar to the LFUCG Parks and Recreation Master Plan.



The **NATIONAL GOLF FOUNDATION'S** work is supported by thousands of members representing every facet of the industry: public and private golf facilities; Golf Resort architects; developers and builders; companies offering specialized services to the golf industry; national, regional, state, and local golf associations; instructors; schools, and individuals.

Their most important ongoing research includes: The Graffis Report; Golf Participation in the U.S.; Golf Facilities in the U.S.; Off-Course Golf Specialty Retail Store Report; and National Golf Rounds Played Report.

There is no greater authority than the NGF on the economics of supply and demand in the business of golf. The NGF's exclusive Golf Demand Model provides best-in-class data on every U.S. market and is utilized by many clients to improve both forecasting and customer targeting. The NGF's database of U.S. golf facilities is the industry's gold standard and is licensed by many of the leading companies and trade associations in golf.

The NGF's Consulting Division was established in 1987 and has conducted more than 1,000 assignments throughout North America, plus Europe, Asia, the Caribbean, and South America. These engagements cover a broad spectrum of services, although assistance to municipalities operating golf facilities has become the landmark service for which the NGF consultants are most well-known.

Since the NGF is not involved in the design, construction, or operation of golf facilities, they are able to provide their clients with completely independent advice. Specific skills and special knowledge provided by NGF to assist with golf operations include:

- **Syndicated Industry Market Research** – The NGF provides on-going research to the golf industry, with annual reports on golf participation, golf facilities, golf industry sales (clubs, bags, apparel, equipment, etc.), golf travel, and other topics.
- **Custom Market Research** – The NGF provides custom research to select clients on issues ranging from new golf product launches, retail site locations, golf consumer behavior, and market size and impact.
- **GolfMAP** – The NGF provides localized golf market research to identify the specific characteristics of local market areas, identifying the potential golf demand and supply balance for any localized geography. This tool is used by NGF in many of our research and consulting engagements but is also available for other companies and consultants to use on a license basis.
- **Golf Consumer Surveys** – The NGF is active in surveying golfers on a wide range of topics, many that will relate to the operational success of golf courses.
- **Custom Golf Facility Consulting** – A hallmark of NGF services includes our custom consulting practice providing services in support of golf facility success. These customized consulting projects include services such as review of operations and strategic planning for golf facilities; review of management and financial analysis of golf facilities; review of golf facility maintenance and best practices; feasibility studies for new facility development or acquisition; research to support changes to golf facility amenities; consulting in support of golf facility transactions.



NGF regularly partners with local golf course architects to assist with capital improvement and operations related tasks. For the LFUCG Parks and Recreation Master Plan, the NFG will work closely with **Kevin Hargrave Golf Course Architect**.

Kevin is a Golf Course Architect based in Georgetown, Kentucky with over 30-years of experience in providing detail oriented, hands-on service to each client to ensure success of their project from start to finish. Services that Kevin provides include:

- Consultations
- Site Surveys
- Tree Management Plans
- Master Plan Development
- Course Routings
- Cost Estimates
- Construction Plan Development, Specifications, Bid Documents, Bid Analysis, and Construction Review.

NGF will lead all golf market demand, programming, and fee analyses tasks for the LFUCG Parks and Recreation Master Plan. NGF will coordinate closely with Kevin Hargrave Golf Course Architect to review and recommend environmental and sustainable/ climate resilience practices and capital improvement recommendations.

Similar to the objectives outlined for the LFUCG Parks and Recreation Master Plan, the NFG and PP+D are currently assisting with the coordination of a comprehensive golf course playability and market demand analysis for the City of Atlanta Department of Parks and Recreation golf course facilities.



Counselman - Hunsaker
AQUATICS FOR LIFE

Founded in 1970 by renowned swimming coach Dr. James E. "Doc" Counselman and national championship and world-record-winning swimmer Joe Hunsaker, **COUNSILMAN-HUNSAKER** has become one of the foremost authorities in aquatic facility design and operations. Over the past five decades, they have delivered state-of-the-art aquatic facilities tailored to the needs of communities, operators, and users. Today, under the leadership of CEO Kevin Post and President Darren Bevard, they continue to provide innovative, sustainable aquatic solutions that uphold the legacy of excellence established by our founders.

Counselman-Hunsaker offers a full circle of aquatic services unavailable anywhere else in the aquatics industry, from existing facility evaluation to comprehensive concept development, project visioning through design, engineering, and construction administration, and business management and aquatic operations. These services are tailored and configured in various ways to precisely fit the needs, desires, and objectives of the owner/operator and the project team.

Counselman-Hunsaker's practical, innovative, and expert design acumen can be seen in universities, municipalities, school districts, hotels and condos, wellness centers, and military bases. Their planning and operations services have helped hundreds of communities make important decisions about future aquatic centers and enhanced the safety and sustainability of their existing pools. Counselman-Hunsaker's mission is "Aquatics For Life."

Counselman-Hunsaker will lead aquatics facilities related tasks include facility evaluations, trend analysis, market demand/ per capita standards, programming, and recommendations.



RMPK FUNDING specializes in identifying additional funding sources to help implement projects in Parks and Recreation Master Plans. They have successfully acquired over \$220 million in funding for public agencies, including numerous grants for park facilities, recreation services, land acquisitions, and cultural facilities projects. They understand federal, state and local grant sources and creatively "stack" grants to allow existing grants to serve as leverage for additional funding.

RMPK Funding will identify alternative funding sources to help implement future projects. RMPK Funding and PP+D Team members have been working together for over 20-years on projects similar to the LFUCG Parks and Recreation Master Plan.

The following pages contains five projects with references, similar to the LFUCG Parks and Recreation Master Plan, that members of the PP+D Team have worked collaboratively in the last 10-years.



CITY OF KNOXVILLE PARKS AND RECREATION MASTER PLAN

Original + Final Project Budget: \$249,500 (On budget)

Length of Project: October 2024 - December 2025 (On schedule)

Perez Planning + Design, LLC (PP+D) is leading the City of Knoxville Parks and Recreation Master Plan serving as the Project Managers and Park Planners for the project. Branded as Play Knoxville, the purpose of the Parks and Recreation Master Plan is to create a framework to enhance the quality and accessibility of parks, recreation facilities, and services throughout the City, lay out a strategy for sustainable growth to connect and expand these resources, complete a comprehensive evaluation of parks, recreation, green spaces, trails, facilities, and programs; and develop an actionable plan that establishes improved levels of service, identifies key areas for park and open space expansions, recommends community connections, and establishes metrics for future review.

PP+D is using its proven 5-phase approach to completing the project including Phase 1-Context Analysis; Phase 2-Needs and Priorities Assessment; Phase 3 - Vision; Phase 4 - Implementation; and Phase 5 - Final Plan and Adoption. PP+D has worked collaboratively with the City to complete a robust public engagement strategy to inform recommendations citywide and per the City's 6 Council Districts. PP+D has used a variety of techniques to collect input including an interactive project website, mailed Statistically Valid Survey, an Online Survey, In-Person Public Meetings, Focus Group Meetings, Stakeholder Interviews, One-on-One Interviews with City Leadership and Elected Officials throughout the process, and 30-member Steering Committee that is guiding the process.

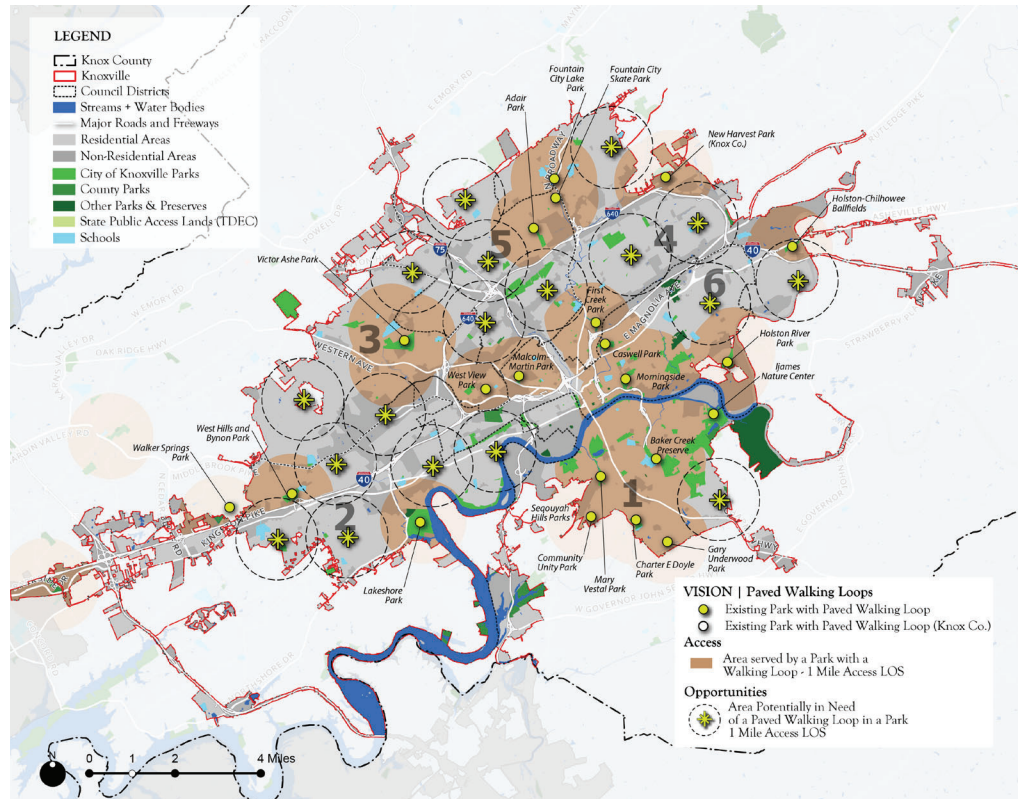
PP+D just completed Phase 3 - Vision, which includes an update to the Department's Mission and Vision and 4 key goals along with related objectives and actions that respond to the priority needs and themes that emerged from Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment. The draft goals are Goal 1) Revitalize existing natural areas, parks, recreation facilities, and programs. Goal 2) Connect the community to the parks and recreation system. Goal 3) Grow the parks and recreation system to keep pace with the City's growth. Goal 4) Collaborate to maximize environmental, social, and economic benefits. The Vision also includes over 300 parks and recreation improvement projects. PP+D is in the process of completing the implementation strategy for the plan which includes funding sources and projections for the next 10-years, prioritized projects, staffing recommendations, and staff actions to implement the plan. The plan is on schedule and on budget to be completed by December 2025.

Reference:

Aaron Browning - Deputy Director
 abrowning@knoxvilletn.gov
 (865) 215-1719
 City of Knoxville Parks and Recreation
 5930 Lyons View Pike at Lakeshore Park
 Knoxville, TN 37919

Relevant PP+D Team Partners:

- **PROS Consulting** - Park Programming, Operations, and Management
- **ETC Institute** - Statistically Valid Survey
- **RMPK Funding** - Alternative Funding Strategies





CITY OF MIAMI PARKS AND RECREATION SYSTEM MASTER PLAN

Original + Final Project Budget: \$499,999
Length of Project: January 2022 - July 2023

Perez Planning + Design, LLC (PP+D) led the City of Miami Parks and Recreation System Master Plan and served as the Project Managers and Park Planners. Branded as Reimagine Parks Miami, the purpose of the Parks and Recreation Master Plan was to assess the existing conditions of the parks and recreation system including programs, services, staffing, and funding; Identify parks and recreation trends, needs, and priorities; Provide strategic and resilient recommendations for the improvement and provision of facilities, programs, services, park land acquisition, and development; and meet the requirements for the Commission of Accreditation of Parks and Recreation Agencies (CAPRA) for the re-accreditation of the Department.

PP+D used its proven 5-phase approach to completing the project including Phase 1-Context Analysis; Phase 2-Needs and Priorities Assessment; Phase 3 - Vision; Phase 4 - Implementation; and Phase 5 -

Final Plan and Adoption. Public Engagement was a critical part of the project and the Team received public input through a variety of techniques including a mailed Statistically Valid Survey, which was statistically representative city-wide and per each of the 5 Commission Districts; an Online Survey in English and in Spanish; In-Person Public Meetings and Virtual Public Meetings available in English and Spanish; Focus Group Meetings; a Multi-lingual Project Website; and an App.

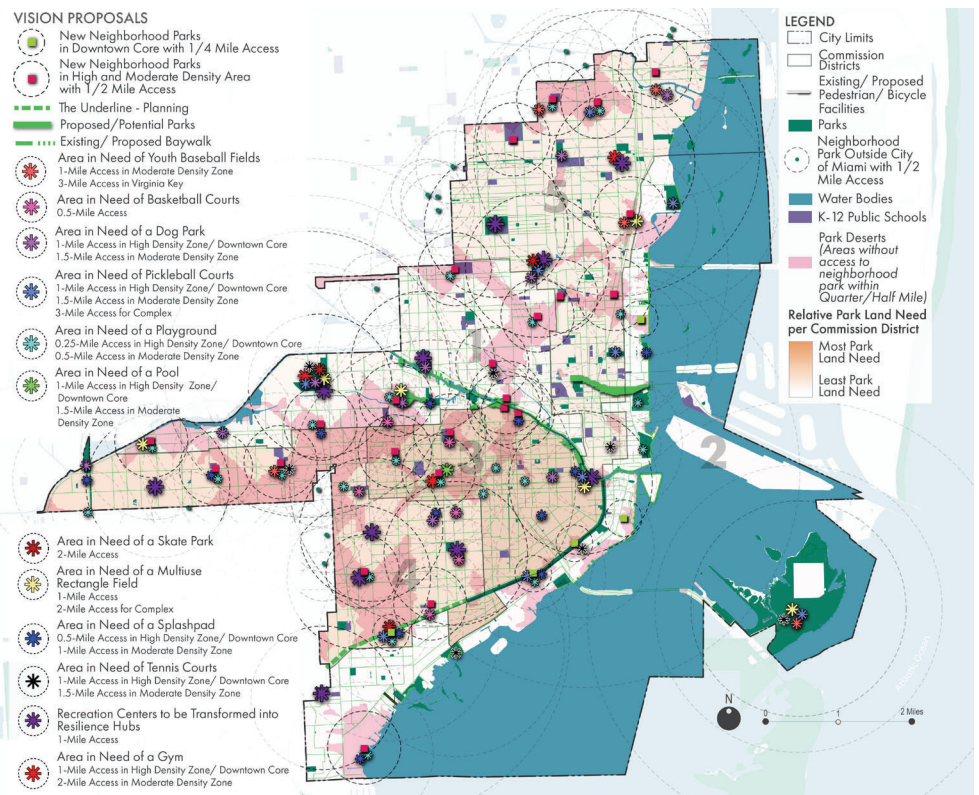
The planning process led to the recommendation of four major Goals with 72 supporting actions and 150 steps with Key Performance Indicators (KPIs). The Goals were- 1) Renew existing facilities programs, and services. 2) Connect the park system seamlessly into the community. 3) Grow the parks system (collaboratively, creatively, and aggressively) to catch-up with the city's growth. 4) Innovate to maximize equitable impact in the community. These goals and policies were linked to physical visions for various types of park land, pedestrian and bicycle connections, indoor recreation centers, and parks and recreation facilities. The plan also included Acreage, Access, Indoor Square Footage, and Facilities Level of Service Targets for the City to pursue over the next 10-years. Lastly, the plan also included an implementation strategy that considered funding options, capital project prioritization strategies, and staff actions.

Reference:

LaCleveia Morley Snipes, CPRE – Interim-Director
 LMorley@miamigov.com
 (305) 416-1332
 City of Miami Parks and Recreation Department
 444 SW 2nd Ave
 8th Floor
 Miami, FL 33130

Relevant PP+D Team Partners:

- **PROS Consulting** - Park Programming, Operations, and Management
- **ETC Institute** - Statistically Valid Survey
- **RMPK Funding** - Alternative Funding Strategies





ACTIVATE ATL: RECREATION AND PARKS FOR ALL CITY OF ATLANTA COMPREHENSIVE RECREATION AND PARKS MASTER PLAN

Original + Final Project Budget: \$399,000 (+\$250,000 for Public Engagement from the Atlanta Philanthropic Community)

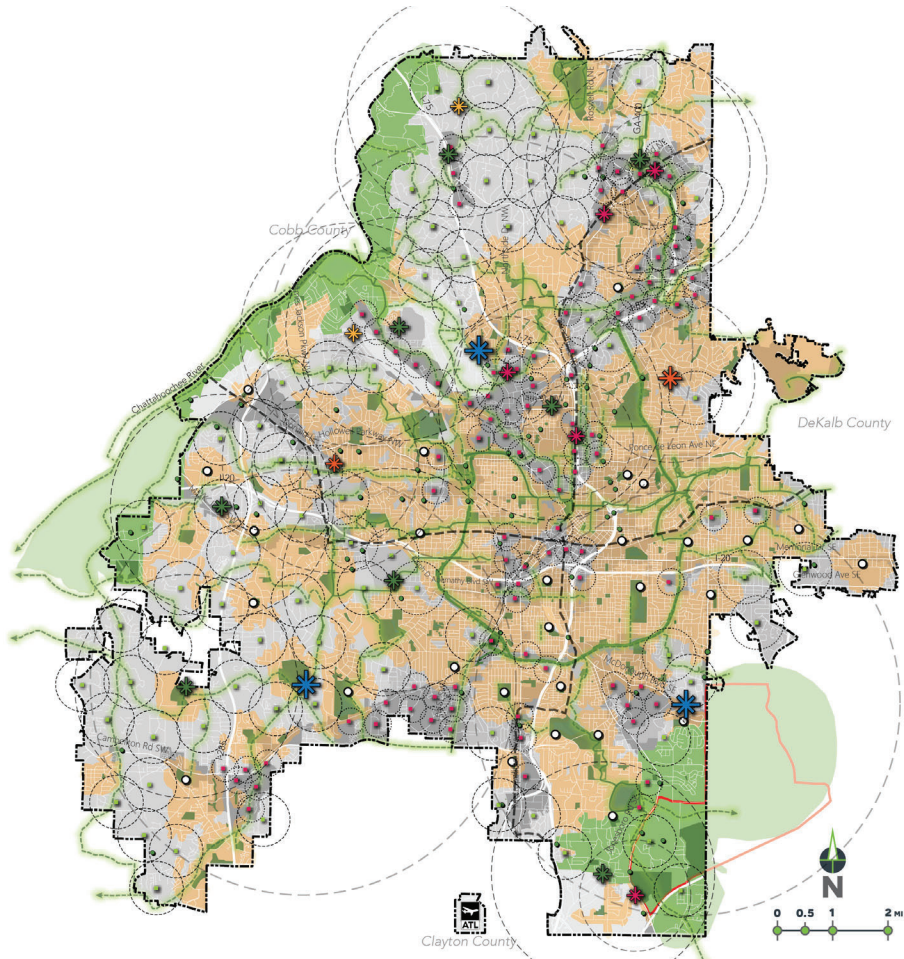
Length of Project: December 2019 - November 2021

Perez Planning + Design (PP+D) led Activate ATL and the Activate ATL 5-year Strategic Plan and served as Project Managers and Parks Planners. The plan aimed at increasing access to exceptional recreational programming, fostering community connections to nature through parks and trails, and ultimately, helping to improve the health, happiness, and resilience of all Atlantans, in all neighborhoods.

Activate ATL is unique and significant to the City's parks and recreation system for three key reasons. First, the Plan addresses inequities and geographic disparities within the parks and recreation system. It ensures that future investments will be prioritized to improve the existing parks and recreation system, especially in historically underserved parks.

Second, the Plan identifies a new mission, vision and three major goals, which are to: Invest in Atlanta's Parks and Recreation Assets; Connect Atlanta's Parks and Recreation Resources; and Grow the Parks and Recreation System. DPR aims to achieve these goals and the action steps that follow over the next ten years.

Third, a new Parks and Recreation Equity Data Tool was developed to use data-driven mapping to accurately identify disparities within the parks and recreation system and help pinpoint specific strategies to eliminate those disparities. The interactive tool evaluates community and park needs and identifies neighborhoods with the greatest need for park investment and capital improvements. Ultimately, it will track and evaluate the impact of DPR's efforts over time. PP+D's proven planning approach and leadership led to the input of over 10,000 Atlantans and the passing of a \$146 Million Bond that will help implement the first phase of the 10-year master plan.



Reference:

Tara L. Buckner, M.P.A., AICP, Urban Planner + Project Manager

tlbuckner@AtlantaGa.Gov

404.546.6737

Office of Park Design

Department of Parks and Recreation

City of Atlanta

233 Peachtree Street NE, Suites 1600/1700

Atlanta, GA 30303

Relevant PP+D Team Partners:

- **PROS Consulting** - Park Programming, Operations, and Management
- **ETC Institute** - Statistically Valid Survey
- **RMPK Funding** - Alternative Funding Strategies



2020 GWINNETT COMPREHENSIVE PARKS AND RECREATION MASTER PLAN

Original + Final Project Budget: \$411,500

Length of Project: September 2019 - June 2021

Gwinnett County is poised to become the most populous County in the State of Georgia. Over the next 10-years, Gwinnett's diverse population is projected to grow by at least 280,000 residents to over 1 million residents. This growth will further define this historically rural and suburban County into defined urban, suburban, and rural communities. This development definition will require that the County consider how best to provide services to residents living in these distinct development patterns while considering equity and financial, environmental, and social sustainability.

Considering these challenges, Perez Planning + Design, LLC led the completion of the 2020 Gwinnett Comprehensive Parks and Recreation Master Plan and served as the Project Managers and Park Planners. PP+D used its proven approach to complete this important plan for the urban County.

Public engagement for the projected included a multi-lingual Statistically-Valid Survey, social media input, on-line surveys, interactive exercises at special events and public meetings, virtual engagement meetings, and hybrid virtual and in-person meetings. Collectively, this strategy led to over 80,000 participant responses.

Based on this data, PP+D developed an equitable and sustainable Long-Range Vision and Implementation Strategy that will define the County's direction over the next 10-years.

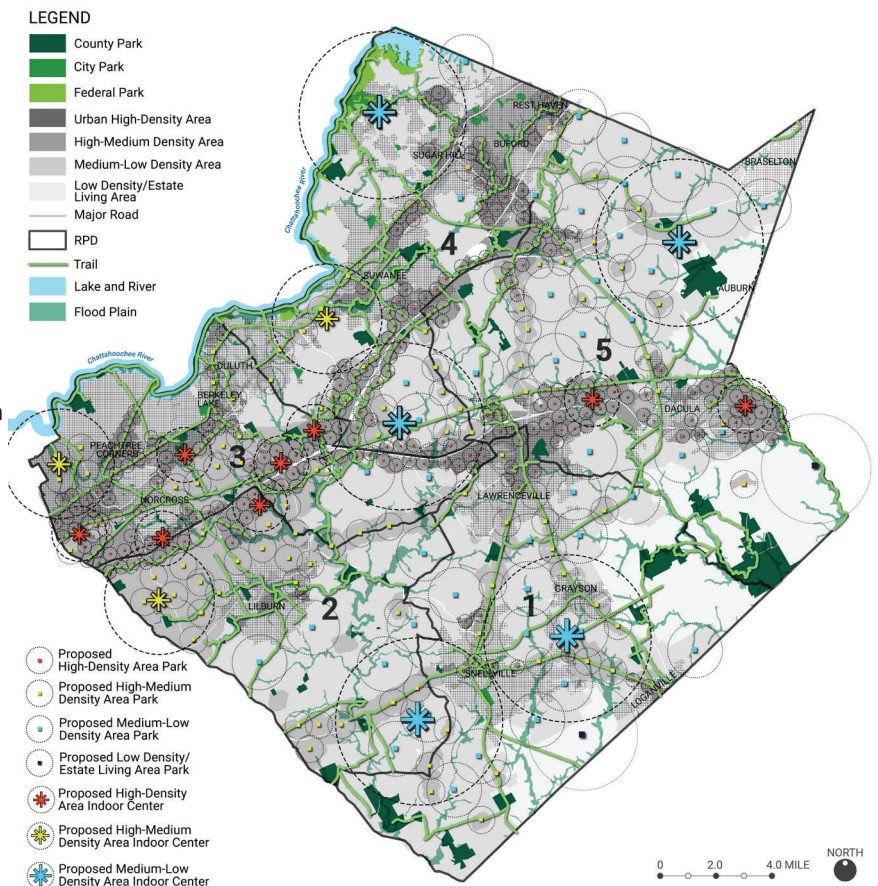
The 2020 Gwinnett Comprehensive Parks and Recreation Master Plan recently won a 2022 National Association of Counties (NACo) Award under the planning category.

Reference:

Mark Patterson - Retired Community Services, Deputy Department Director
Gwinnett County Department of Community Services
Phone: (404) 219-8339
Mark Patterson pattersonecs@gmail.com

Relevant PP+D Team Partners:

- **PROS Consulting** - Park Programming, Operations, and Management
- **ETC Institute** - Statistically Valid Survey
- **RMPK Funding** - Alternative Funding Strategies



"Care for both the client and the product are hallmarks of any project PP+D has done with Gwinnett County. PP+D brings a level of expertise and excellence to our projects that most firms wish they possessed. Their individual attention to detail, energy, and thoughtfulness that Carlos and his team brings to the process fosters both introspection and affirmation of our agency's goals. Carlos can provide immense skill in aligning project goals and budget while exploring unasked questions that facilitated a profound impact to the communities he works with. I would not hesitate to recommend PP+D to any project, especially where sensitivity to the issues and barrier breaking thought is needed."

- Mark Patterson, Retired Deputy Director - Department of Community of Services over the Division of Parks and Recreation



DISTRICT OF COLUMBIA PARKS AND RECREATION MASTER PLAN

Original + Final Project Budget: \$682,000

Length of Project: January 2013 - January 2015

Carlos Perez served as the Project Manager / Parks Planner for the Parks and Recreation Master Plan for the National Capitol of the United States. Branded as PLAY DC, this plan developed a new, bold, and strategic vision for advancing Washington D.C.'s parks and recreation resources.

PLAY DC was comprised of six phases: Phase I: Capital + Programmatic Existing System Analysis which established an understanding of the existing and planned conditions of the District's parks and recreation system by developing a baseline inventory of the District's programmatic offerings, parks, and recreation centers; reviewing relevant plans and studies; and conducting site visits. Phase II: Historic Preservation Review assessed the District historical buildings and features and outlined their role within the parks system. Phase III: Capital + Programmatic Needs Assessment included a comprehensive, community participation-driven needs assessment process that employed qualitative, quantitative, and anecdotal analysis techniques to identify resident recreational, social, and cultural needs and desires. Phase IV: Visioning established a bold new vision for the District's park system based on resident and stakeholder input as well as industry best practices. Phase V: Implementation Strategy articulated a phased plan for the realization of the new, robust parks and recreation system. Phase IV: Master Plan Report focused on creating a user friendly and graphically compelling document that could be easily understood by the public.

PLAY DC informed the future decisions made concerning District parks, recreation facilities, and programming, and, outline a framework for capital investment. The project was overseen by a 36 member advisory committee comprised of District of Columbia government department heads and directors and representatives from various agencies and organizations throughout the National Capitol.



Reference:

Christopher Delfs, AICP
District of Columbia Office of Planning
Chief of Staff During Project Completion
cdelfs@cityoflancasterpa.com
(717) 291-4759

Relevant PP+D Team Partners:

- ETC Institute - Statistically Valid Survey

"Carlos and his Team achieved all of the project objectives of the District of Columbia Parks and Recreation Master Plan (Play DC) and through their dedication, responsiveness and professionalism exceeded client expectations. In my 15 years as a professional in government, Carlos and his Team are my favorite consultants with whom I have worked, and remain my go-to people when I have a tough question in the world of parks planning and design. In an industry where cookie-cutter contractor work is too common, Carlos and his Team are thoughtful and tireless in their problem solving and bring an extraordinary ability to create context-sensitive solutions."

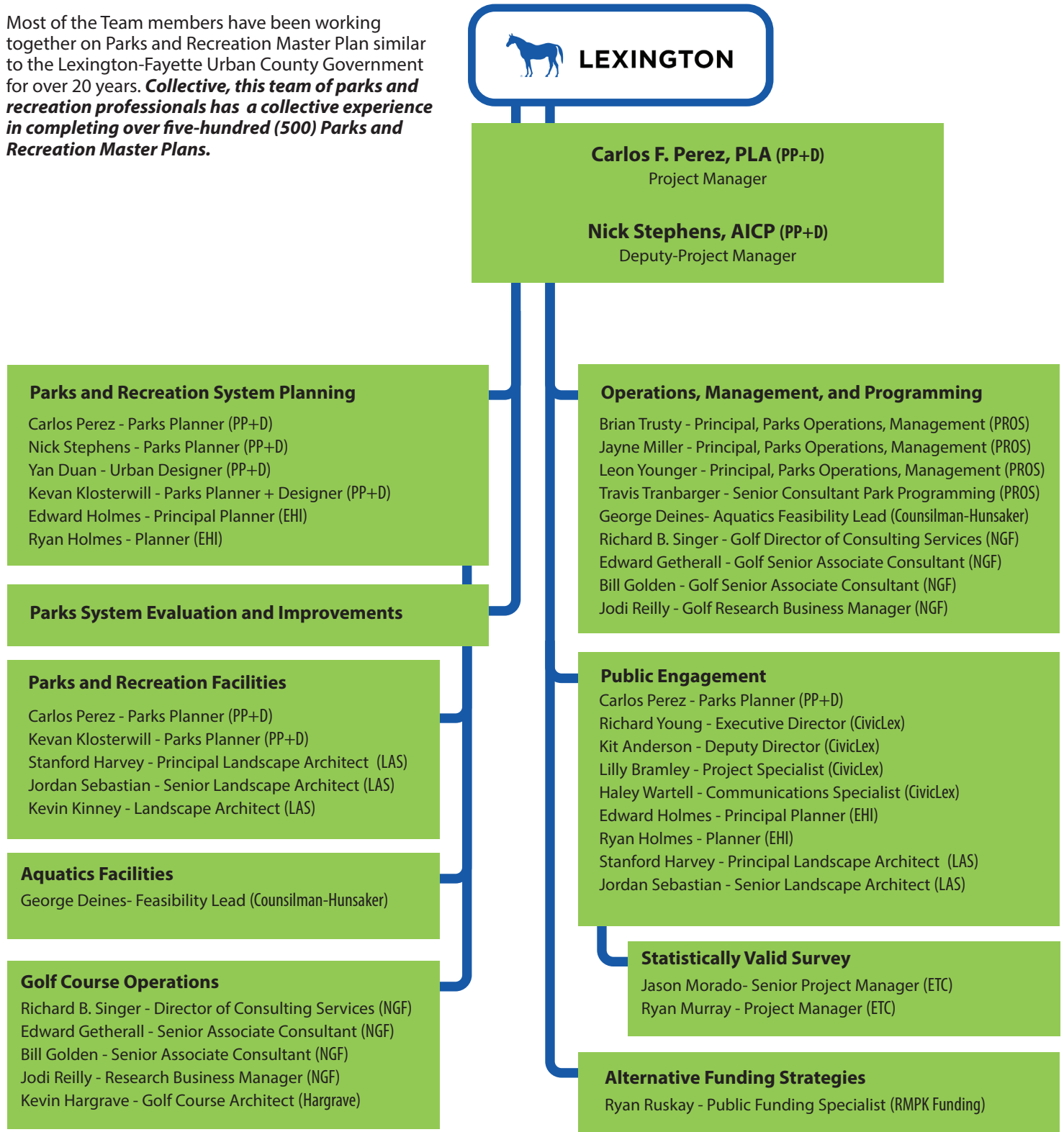
- Christopher Delfs, Former Chief of Staff



Organizational Chart

The Perez Planning + Design (PP+D) Team is comprised of professional that are local, regional, and national thought leaders and experts in Parks and Recreation Master Planning.

Most of the Team members have been working together on Parks and Recreation Master Plan similar to the Lexington-Fayette Urban County Government for over 20 years. **Collective, this team of parks and recreation professionals has a collective experience in completing over five-hundred (500) Parks and Recreation Master Plans.**





CARLOS F. PEREZ, PLA

Project Manager | Parks Planner | Active Transportation Planner | Landscape Architect

EDUCATION

Master in City and Regional Planning
Specialization in Transportation
Georgia Institute of Technology, 2015

Master of Science in Urban Design
Georgia Institute of Technology, 2015

Bachelor of Science in Landscape Architecture,
University of Florida, 2004

PROFESSIONAL REGISTRATIONS

Landscape Architect, Florida #LA6666902
Landscape Architect, Georgia #LA001824
Landscape Architect, Tennessee #LA1283

YEARS OF EXPERIENCE WITH FIRM

20 years

AWARDS + RECOGNITIONS

Nassau County Parks, Recreation, and Open Space Master Plan
Florida Chapter of American Planning Association Award of Excellence, 2022

PATH Parkway - #1 Best New Bikeway for 2017, People for Bikes, 2018

PATH 400 - Quality of Life/Community Development Award, 2018 AASHTO
Annual Meeting

PATH 400 - Grand Prize Winner- Alternative Mode Transportation Facility
Georgia Partnership for Transportation Quality, 2016

District of Columbia Parks and Recreation Master Plan
Award of Excellence, National Capital Area Chapter of the American Planning
Association, 2014

2014 University of Florida Young Outstanding Alumni – College of Design,
Construction and Planning

Urban Land Institute Center for Leadership Class of 2014

1st Place - Green Mobility Challenge, Texas Department of Transportation +
Central Texas Regional Mobility Authority, 2011

PRESENTATIONS

High Performance Public Spaces - How Parks Can Make Communities More
Resilient and Sustainable, National Recreation and Park Association
Conference,
Atlanta, GA 2024

Activate ATL: Combating Historic Inequities Through Implementation of ATL's
Parks & Recreation Master Plan, National Recreation and Park Association
Conference, Atlanta, GA 2024

Trails in Atlanta Conference Session, Creative Placemaking Summit, Atlanta,
GA 2024

PROFESSIONAL HISTORY

Perez Planning + Design, LLC
President + Founder (2014 - Present)

AECOM/Glatting Jackson | Building + Places
Senior Associate | Parks + Open Space System Planning and Design Practice
Co-Leader (2009 - 2014)

Glatting Jackson Kercher Anglin, Inc.
Associate | Landscape Architect (2009-2014)

PROFESSIONAL AFFILIATIONS

City Parks Alliance - Board Member | Secretary

Atlanta BeltLine Partnership - Board Member

Georgia Institute of Technology Advisory Council - Board Member

University of Florida Department of Landscape Architecture Advisory Council
- Board Member

Park Pride – Former Board Member

Carlos Perez specializes in Parks and Recreation System Planning + Design and Active Transportation Planning + Design. His academic training and professional specialization in parks and recreation system planning and design, active transportation planning and design, urban design, and landscape architecture provide for a unique view and keen understanding of the important, multifaceted role that the public realm plays in creating livable communities.



Carlos has worked with over 100 communities throughout the United States on parks and recreation system planning projects.

Carlos also specializes in Active-Transportation Planning and Design and has worked on a multitude of bicycle, pedestrian, trail, and greenway planning and design projects in the Southeast United States. He is also one of the lead trail planners and designers for the PATH Foundation, Inc., a non-profit organization in the Metro Atlanta area that has built over 300 miles of trails.

Carlos also volunteers his time as a Board Member of the City Parks Alliance, Atlanta BeltLine Partnership, Georgia Institute of Technology College of Design Advisory Council, and the University of Florida Department of Landscape Architecture Advisory Council. He also enjoys regularly speaking and sharing his experience and expertise at National, State, and Local conference on the Power of Parks.

RELEVANT PARKS AND RECREATION MASTER PLAN EXPERIENCE

- City of Seattle Indoor Recreation Center Master Plan, WA
- Downtown San Diego Parks and Recreation Needs Assessment, CA
- Clark County Parks and Recreation Master Plan, NV
- BREC Parks Planning, East Baton Rouge Parish, LA
- City of Lenexa Parks and Recreation Master Plan, KS
- District of Columbia Parks and Recreation Master Plan, Washington, D.C.
- City of Virginia Beach Parks and Recreation Master Plan, VA
- City of Norfolk Parks and Recreation Master Plan, VA
- City of Raleigh Parks and Recreation Master Plan, NC
- City of Pittsboro Parks and Recreation Master Plan, NC
- City of Knoxville Parks and Recreation Master Plan, TN
- Williamson County Parks and Recreation Master Plan, TN
- Germantown Parks and Recreation Master Plan Update, TN
- City of Atlanta Parks and Recreation Master Plan, GA
- City of Decatur Parks and Recreation Master Plan, GA
- City of Doraville Parks and Recreation Master Plan, GA
- City of Forest Park Parks and Recreation Master Plan, GA
- City of Norcross Parks, Greenspace, Trails, and Green Infrastructure Master Plan, GA
- City of South Fulton Parks, Recreation, and Cultural Affairs Master Plan, GA
- Gwinnett County Parks and Recreation Master Plan, GA
- Henry County Parks and Recreation Master Plan, GA
- City of Cape Coral Parks and Recreation Master Plan, FL
- City of Destin Parks and Recreation Master Plan, FL
- City of Fort Lauderdale Parks and Recreation Master Plan, FL
- City of Fort Myers Parks and Recreation Master Plan, FL
- City of Hollywood Parks and Recreation Master Plan, FL
- City of Miami Parks and Recreation Master Plan, FL
- City of Marco Island Parks and Recreation Master Plan, FL
- City of Naples Parks and Recreation Master Plan, FL
- City of Orlando Parks and Recreation Master Plan, FL
- City of Port St. Lucie Parks and Recreation Master Plan, FL
- City of Sarasota Parks and Recreation Master Plan, FL
- Town of Palm Beach Parks and Recreation Master Plan, FL
- Broward County Parks and Recreation Master Plan, FL
- Miami-Dade County Parks and Recreation Master Plan Vision, FL
- Sarasota County Parks and Recreation Master Plan, FL



NICK STEPHENS, AICP (PP+D)

Deputy Project Manager + Parks Planner

Nick Stephens is an urban planner who is dedicated to planning and designing park systems that enrich communities, encourage active transportation, and strengthen the local ecology. With a diverse academic and professional background, Nick's experience supports a passion for creating vibrant, walkable and bikable urban areas. Since joining PP+D, he has collaborated on over a 20 parks and recreation system plans. He will serve as the Deputy Project Manager and Parks Planner for the project.

RELEVANT RECENT EXPERIENCE

EDUCATION

Master in City and Regional Planning
Specialization in Urban Design
Georgia Institute of Technology, 2019

Bachelor of Arts in Anthropology,
Columbia University, 2009

TOTAL YEARS OF EXPERIENCE

5 years

PROFESSIONAL REGISTRATIONS

AICP

City of Knoxville Parks and Recreation System Master Plan

Knoxville, TN | On-going
Role: Deputy Project Manager/Parks Planner

Clark County Parks and Recreation System Master Plan

Clark County, NV | On-going
Role: Parks Planner

City of Destin Parks and Recreation Master Plan

Destin, FL | On-going
Role: Parks Planner

City of Norcross Parks, Greenspace, Trails and Green Infrastructure Master Plan

Norcross, GA | 2024
Role: Deputy Project Manager/Parks Planner

Henry County Parks and Recreation System Master Plan

Henry County, GA | 2024
Role: Deputy Project Manager/Parks Planner

City of Fort Myers Parks and Recreation System Master Plan

Fort Myers, FL | 2024
Role: Deputy Project Manager/Parks Planner

Williamson County Parks and Recreation System Master Plan

Williamson County, TN | 2023
Role: Parks Planner

City of Miami Parks and Recreation System Master Plan

Miami, FL | 2023
Role: Parks Planner

City of Boynton Beach Parks Master Plan

Boynton Beach, FL | 2023
Role: Parks Planner

City of South Fulton Parks, Recreation, and Cultural Affairs Master Plan

City of South Fulton, GA | 2023

Role: Parks Planner

City of Ormond Beach Parks Master Plan

Ormond Beach, FL | 2022
Role: Parks Planner

City of Atlanta Comprehensive Parks and Recreation Master Plan

Atlanta, GA | 2022
Role: Parks Planner

Gwinnett County Comprehensive Parks and Recreation Master Plan

Gwinnett GA | 2021
Role: Parks Planner

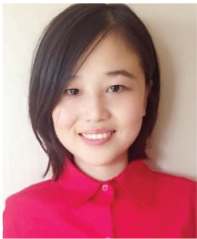
City of Hollywood Parks Master Plan

Hollywood, FL | 2021

Role: Parks Planner

City of Port St. Lucie Parks and Recreation Master Plan

Port St. Lucie, FL | 2020
Role: Project Manager + Urban Designer



YAN DUAN, AICP (PP+D)

Parks Planner + Urban Designer

Yan Duan is a planner and urban designer with over 10 years of experience in planning and community design projects. Yan's expertise is in research, design, GIS, and visual communications. She combines these strengths to develop thoughtful, practical, and innovative parks planning and design solutions. Yan will work collaboratively with the Team and will serve as a Parks Planner for the project. She will assist with qualitative and quantitative research tasks including, preparing exhibits for public virtual or in-person public engagement, GIS mapping, analysis, and development of exhibits and deliverables for the project.

RELEVANT RECENT EXPERIENCE

City of Knoxville Parks and Recreation System Master Plan

Knoxville, TN | On-going
Role: Parks Planner

Clark County Parks and Recreation System Master Plan

Clark County, NV | On-going
Role: Parks Planner

City of Destin Parks and Recreation Master Plan

Destin, FL | On-going
Role: Parks Planner

City of Norcross Parks, Greenspace, Trails and Green Infrastructure Master Plan

Norcross, GA | 2024
Role: Parks Planner

Henry County Parks and Recreation System Master Plan

Henry County, GA | 2024
Role: Parks Planner

City of Fort Myers Parks and Recreation System Master Plan

Fort Myers, FL | 2024
Role: Parks Planner

Williamson County Parks and Recreation System Master Plan

Williamson County, TN | 2023
Role: Parks Planner

City of Miami Parks and Recreation System Master Plan

Miami, FL | 2023
Role: Parks Planner

City of Boynton Beach Parks Master Plan

Boynton Beach, FL | 2023

Role: Parks Planner

City of South Fulton Parks, Recreation, and Cultural Affairs Master Plan

City of South Fulton, GA | 2023
Role: Parks Planner

City of Ormond Beach Parks Master Plan

Ormond Beach, FL | 2022
Role: Parks Planner

City of Atlanta Comprehensive Parks and Recreation Master Plan

Atlanta, GA | 2022
Role: Parks Planner

Gwinnett County Comprehensive Parks and Recreation Master Plan

Gwinnett GA | 2021
Role: Parks Planner

City of Hollywood Parks Master Plan

Hollywood, FL | 2021

Role: Parks Planner

City of Port St. Lucie Parks and Recreation Master Plan

Port St. Lucie, FL | 2020
Role: Parks Planner

EDUCATION

University at Buffalo, the State University of New York (SUNY Buffalo) School of Architecture and Planning Master of Urban Planning with Specialization in Urban Design and Physical Planning, 2016

Xi'an University of Technology, Xi'an, P.R., China School of Civil Engineering and Architecture Bachelor of Engineering in Urban Planning, 2013

Summer Program, Harvard University, 2007

TOTAL YEARS OF EXPERIENCE

8 years

PROFESSIONAL REGISTRATIONS

AICP



DR. KEVAN WILLIAMS (PP+D)

Parks Planner + Designer

Dr. Kevan Klosterwill is a landscape designer and parks planner whose experience ranges from serving as the lead Park Planner for Athens-Clarke County, Georgia to consulting on parks and cultural landscape documentation projects across the United States. He also brings experience in research on historic and contemporary community engagement practices, publishing in leading scholarly journals. His book on Olmsted protege Warren H. Manning's participatory planning practices is slated for publication in 2024.

RELEVANT RECENT EXPERIENCE

EDUCATION

PhD in the Constructed Environment. University of Virginia. 2020.

Master of Landscape Architecture, with certificates in Environmental Ethics and Conservation Ecology and Sustainable Development. University of Georgia. 2014.

Bachelor of Landscape Architecture. University of Georgia. 2010.

TOTAL YEARS OF EXPERIENCE

13 years

City of Knoxville Parks and Recreation System Master Plan

Knoxville, TN | On-going
Role: Parks Planner

Clark County Parks and Recreation System Master Plan

Clark County, NV | On-going
Role: Parks Planner

City of Destin Parks and Recreation Master Plan

Destin, FL | On-going
Role: Parks Planner

City of Norcross Parks, Greenspace, Trails and Green Infrastructure Master Plan

Norcross, GA | 2024
Role: Parks Planner

Henry County Parks and Recreation System Master Plan

Henry County, GA | 2024
Role: Parks Planner

City of Fort Myers Parks and Recreation System Master Plan

Fort Myers, FL | 2024
Role: Parks Planner

Williamson County Parks and Recreation System Master Plan

Williamson County, TN | 2023
Role: Parks Planner

City of Miami Parks and Recreation System Master Plan

Miami, FL | 2023
Role: Parks Planner

City of Boynton Beach Parks Master Plan

Boynton Beach, FL | 2023
Role: Parks Planner

City of South Fulton Parks, Recreation, and Cultural Affairs Master Plan

City of South Fulton, GA | 2023
Role: Parks Planner

City of Ormond Beach Parks Master Plan

Ormond Beach, FL | 2022
Role: Parks Planner

City of Atlanta Comprehensive Parks and Recreation Master Plan

Atlanta, GA | 2022
Role: Parks Planner

Gwinnett County Comprehensive Parks and Recreation Master Plan

Gwinnett GA | 2021
Role: Parks Planner

City of Hollywood Parks Master Plan

Hollywood, FL | 2021
Role: Parks Planner

City of Port St. Lucie Parks and Recreation Master Plan

Port St. Lucie, FL | 2020
Role: Parks Planner



RYAN RUSKAY (RMPK)

Public Funding Specialist

Ryan Ruskay has more than 20 years of extensive experience in the evaluation and management of various state and federal funding programs, obtaining \$220 million in the past nine years. He has worked with a wide range of local governments to find and obtain the funding necessary to make their capital projects a success. His projects consistently place in the top percentages of funding programs on the local, state, and federal level. In addition to assisting local communities in obtaining funding for capital projects, Ryan has developed Capital Improvement and Strategic Funding Plans for many of their clients. He will identify alternative funding sources for capital improvements.

RELEVANT RECENT EXPERIENCE

EDUCATION

Bachelor of Science, Political Science
Florida State University

TOTAL YEARS OF EXPERIENCE

17 years

City of Knoxville Parks and Recreation System Master Plan

Knoxville, TN | On-going
Role: Public Funding Specialist

City of Destin Parks and Recreation Master Plan

Destin, FL | On-going
Role: Public Funding Specialist

City of Fort Myers Parks and Recreation System Master Plan

Fort Myers, FL | 2024
Role: Public Funding Specialist

Williamson County Parks and Recreation System Master Plan

Williamson County, TN | 2023
Role: Public Funding Specialist

City of Miami Parks and Recreation System Master Plan

Miami, FL | 2023
Role: Public Funding Specialist

City of Boynton Beach Parks Master Plan

Boynton Beach, FL | 2023
Role: Public Funding Specialist

City of South Fulton Parks, Recreation, and Cultural Affairs Master Plan

City of South Fulton, GA | 2023
Role: Public Funding Specialist

City of Ormond Beach Parks Master Plan

Ormond Beach, FL | 2022
Role: Public Funding Specialist

City of Atlanta Comprehensive Parks and Recreation Master Plan

Atlanta, GA | 2022
Role: Public Funding Specialist

Gwinnett County Comprehensive Parks and Recreation Master Plan

Gwinnett GA | 2021
Role: Public Funding Specialist

City of Hollywood Parks Master Plan

Hollywood, FL | 2021
Role: Public Funding Specialist



Brian Trusty

PROS Consulting

Principal

Education

B.S., Texas A&M University, 1995

M.S., Texas A&M University, 2000

Employment History

Principal, PROS Consulting, Jan. 2022-Present

Vice-President, National Audubon Society, Nov. 2012-2021

Vice-President, PROS Consulting, Jan. 2007 to Oct. 2012

Executive Director, Adventure Sports Center International (ASCI), May 2005 to Nov. 2007

Manager — Nature Park System, Lower Colorado River Authority, Sep. 2000 to March 2005

President and Founder, SierraQuest Corporation, Sep. 1993 to Aug. 2003



Professional Experience

Brian Trusty has enjoyed a 28-year career in parks and recreation, land and habitat management, tourism, and economic development that includes executive management responsibilities in private for-profit, private non-profit, and public organizations. Brian's career includes managing an outdoor adventure tour program he founded that operated in 22 U.S. states, Canada, and Mexico; managing a system of nature parks for the Lower Colorado River Authority (LCRA) in Texas; leading the development and operation of the premier adventure sports destination on the east coast; performing strategic planning and management consulting for parks and recreation and land management agencies throughout the United States; and leading Audubon's conservation and environmental education programs in Texas and the Central Flyway. Brian also led the charge in uniting and elevating Audubon extensive network of nature centers and wildlife sanctuaries throughout the United States for the last two years. Brian has served on the Texas State Parks Advisory Committee since 2013 as its Chair and was the primary author on the recent Committee recommendations to the Texas Parks and Wildlife Commission regarding financial sustainability for the Texas State Parks System in the future. This led to the successful passage of a state constitutional amendment in 2019 establishing a dedicated public funding source for Texas State Parks. In 2019, Brian was recognized as a Distinguished Alumni of Texas A&M's Parks, Recreation and Tourism Sciences Department.

Similar Project Experience

- State of Kentucky Parks, Operations and Financial Strategic Plan
- Nashville, TN Parks and Recreation Master Plan
- Knoxville, TN Parks and Recreation Master Plan
- Chattanooga, TN Comprehensive Recreation Program Plan
- Georgia State Parks Business Development Planning
- Johns Creek, GA Parks and Recreation Master Plan
- Richardson, TX Parks and Recreation Master Plan
- Fort Worth, TX Athletic Field Study
- San Antonio, TX Youth Services Plan
- Texas State Parks Business Planning Services
- Olathe, KS Parks and Recreation Master Plan
- Derby, KS Parks and Recreation Master Plan
- Bays Mountain Regional Park Long Range Strategic Plan (Kingsport, TN)
- California State Parks Operations and Financial Plan
- Eastern Kentucky Regional Adventure Tourism Plan
- Maryland State Parks Operational and Financial Plan
- Central Iowa Water Trails Governance and Management Analysis (Des Moines, IA)
- City of Glendale, AZ Parks and Recreation Master Plan
- City of Sedona, AZ Parks and Recreation Master Plan

**Jayne Miller****PROS Consulting Principal****Education**

M.A., University of Maryland

B.A., Midland Lutheran College

Employment History

CEO, Jayne Miller Consulting, June 2020 to present

President/CEO, Pittsburgh Parks Conservancy, Feb. 2018 to Oct. 2020

Superintendent, Minneapolis Park & Recreation Board, Nov. 2010 to Feb. 2018

Director, Huron-Clinton Metropolitan Authority, March 2010 — Sept. 2010

Community Services Area Administrator, City of Ann Arbor, Aug. 2003 to Feb. 2010

Parks & Recreation Manager, City of Ann Arbor, Aug. 2000 to Aug. 2003

Certification

Certified Park and Recreation Professional

Professional Experience

Jayne is the founder and CEO of Jayne Miller Consulting. She has 40 years in parks, recreation and leisure services with over 20 years of executive level public and non-profit leadership experience. Jayne is an internationally recognized leader in the field of urban parks and recreation and an international leader in developing and implementing equitable investment strategies for park systems. She has held positions as the President & CEO of the Pittsburgh Parks Conservancy in Pittsburgh, PA.; Superintendent of the Minneapolis Park & Recreation Board in Minneapolis, MN.; Director of the Huron-Clinton Metropolitan Authority in Brighton, MI.; Community Services Area Administrator for the City of Ann Arbor in Ann Arbor, MI.; and Manager of Parks and Recreation for the City of Ann Arbor in Ann Arbor, MI. Jayne is routinely invited to present on leadership, equity, and management of urban park systems at international, national, regional and state conferences and workshops. Under Jayne's leadership the Pittsburgh Parks Conservancy (PPC) and the Minneapolis Park and Recreation Board (MPRB) have been recognized for their work on social equity. The Pittsburgh Parks Conservancy was the recipient of the National Recreation and Park Association's 2020 Innovation in Social Equity Award and the Pennsylvania Recreation and Park Society's 2020 Award of Excellence for the Restoring Pittsburgh Parks Initiative. The Minneapolis Park & Recreation Board received the Minnesota Recreation and Park Association's 2017 Award of Excellence for the 20-Year Neighborhood Park Plan. Jayne has also been recognized individually for her work. Currently, Jayne serves on the board of City Parks Alliance and serves as World Urban Parks board chair. She is a CAPRA Commissioner, Director of the Park Foundation School, and an American Academy of Park and Recreation Administration Fellow.

**Similar Project Experience**

- Louisville, KY Parks For All Action Plan, Parks and Recreation Master Plan
- Study of Maryland State Parks System
- BREC, East Baton Rouge Parish, LA Community Engagement Policy
- Cuyahoga Valley National Forest Conservancy Strategic Plan
- Pittsburgh Parks Conservancy, PA, Restoring Pittsburgh Parks, Parks and Recreation Master Plan
- Pittsburgh Parks Conservancy, PA, Led PPC fundraising in 2019 raising \$12.1M in 9 months — most funds raised in a single period over the PPC's 23-year history
- Minneapolis Park & Recreation Board, MN, 20 Year Neighborhood Park Plan
- Minneapolis Park & Recreation Board, MN, Secured 20 Year Neighborhood Park funding in a 20-year MPRB and City of Minneapolis agreement for over \$250M for park maintenance, rehabilitation and capital improvements
- Minneapolis Park & Recreation Board, MN, Led MPRB efforts developing equitable investment strategies and implementation: Capital & Rehabilitation Projects, Recreation Center funding, and Racial Equity Action Plan addressing racial and economic equity
- Minneapolis Park & Recreation Board, MN, Improved operational capacity through improved operational effectiveness and reduction in annual operating expenses by \$2.3 million in Minneapolis Park System



Leon Younger, CPRP

PROS Consulting

President

Education

M.P.A., University of Kansas, Aug. 1988

B.S., Kansas State University, May 1975

Employment History

President, PROS Consulting, Sep. 1995 to present

Director/Chairman of the Board, Indianapolis Parks and Recreation, Apr. 1992 to Sept. 1995

Executive Director, Lake MetroParks (OH), Jun. 1988 to Mar. 1992

Director, Jackson County (MO) Parks and Recreation, Aug. 1983 to Jun. 1988

Certification

Certified Park and Recreation Professional

Professional Experience

Leon is the founder and President of PROS Consulting. He has more than 40 years in parks, recreation, and leisure services. Leon is a recognized leader in applying innovative approaches to managing parks and recreation organizations. He has held positions as Director of Parks and Recreation in Indianapolis, IN; Executive Director of Lake Metroparks in Lake County, OH (Cleveland area); and Director of Parks and Recreation in Jackson County, MO (Kansas City). Leon is routinely invited to present his management and development philosophies at conferences, workshops, and training across the United States, as well as internationally. He is co-creator of the Community Values Model, a business model that synthesizes community & stakeholder input into a strategic plan. He regularly addresses sessions at the National Recreation and Park Association Conferences and has served as a board member and instructor at the Pacific Revenue and Marketing School in San Diego, California and the Rocky Mountain Revenue and Management School in Colorado. Currently, Leon is serving on the Board of Directors for the City Parks Alliance, the only independent, nationwide membership organization solely dedicated to urban parks.

Similar Project Experience

- Louisville, KY Parks For All Action Plan, Parks and Recreation Master Plan
- Gwinnett County, GA Parks and Recreation Master Plan; Maintenance Management Plan
- Athens Clarke County, GA Parks and Recreation Master Plan
- Georgia State Park Business Planning Services
- Charlotte/Mecklenburg County, NC Parks and Recreation Master Plan
- Jacksonville, NC Parks and Recreation Master Plan
- Apex, NC Parks and Recreation Master Plan
- Holly Springs, NC Parks and Recreation Master Plan
- Transylvania County, NC Parks and Recreation Master Plan
- Sioux Falls, SD Parks and Recreation Master Plan
- Carmel, IN Parks and Recreation Master Plan
- Derby Recreation Commission, KS Strategic Master Plan
- Shawnee County, KS (Topeka) Parks and Recreation Strategic Master Plan
- Merriam, KS Parks and Recreation Facilities Master Plan
- Lawrence, KS Parks and Recreation Master Plan
- Olathe, KS Parks and Recreation Master Plan & Recreation Center Feasibility Study
- City of Kansas City, MO Parks and Recreation Master Plan
- Westerville, OH Parks, Recreation and Open Space Master Plan
- Upper Arlington, OH Parks and Recreation Master Plan
- Prince George's County, MD Functional Master Plan for Parks, Recreation and Open Space
- Cleveland Metroparks, OH Strategic, Financial and Operational Master Plan
- San Francisco, CA Recreation Plan and Needs Assessment



**Travis Tranbarger, CPRP****PROS Consulting****Senior Project Manager****Education**

B.S. Sport Administration, Ball State University

Employment History

Consultant, PROS Consulting; 2023 - present

Director of Parks and Recreation, Town of Brownsburg, IN; 2017-2023

Assistant Director of Parks and Recreation, Town of Brownsburg, IN; 2013-2017

Recreation Superintendent, Town of Brownsburg, IN; 2010 to 2013

Park Manager, City of Indianapolis, IN; 2006 to 2010

**Certification**

Certified Park and Recreation Professional (CPRP)

Professional Experience

Travis has nearly 20 years of experience in the field of parks and recreation. Over these years he has served urban and suburban park systems including a variety of types of recreation facilities.

His experience in the municipal setting includes overseeing immense organizational growth, finance management, grant writing, several large and minor park capital improvement projects, establishing operational policies and procedures, board management, instituting information technology systems for operational efficiencies, strategic community partnerships, and successful community engagement campaigns.

Travis has served on the Indiana Parks and Recreation Association's Board of Directors for more than 10 years in various capacities, including most recently, the President-Elect role, and was a past recipient of IPRA's Young Professional of the Year Award. He also serves on the Park Foundation of Hendricks County Board of Directors and is a past member of the Indiana Department of Natural Resources' Trail Advisory Board.

Similar Project Experience

- O'Fallon, MO Maintenance Management Plan and Parks and Recreation Master Plan
- Village of Woodlawn, OH Recreation Needs Assessment
- Wake Forest, NC Recreation Demand Study
- Philadelphia, PA Fairmount Park — Centennial District Master Plan Update
- Hayward Area Recreation District, CA Recreation Needs Assessment
- Burnsville, MN Parks and Recreation Master Plan
- Bloomington, MN Recreation Center Feasibility Study
- Marysville, OH Parks and Recreation Master Plan
- Powell, OH Parks and Recreation Master Plan
- Greenfield, OH Organizational Study
- Cleveland, OH Program Assessment
- Carmel, IN Parks and Recreation Master Plan
- Carmel, IN Monon Community Center and Waterpark Business Plans
- Brownsburg, IN Park Site Master Planning, Design, and Development
- Brownsburg, IN Multi-generational Community Center Pre-Design Plan
- Brownsburg, IN Aquatic Center Feasibility Study
- Lawrence, KS Program Assessment and Parks and Recreation Master Plan



Stanford Harvey FAICP
Principal

Credentials

- Master of City Planning, Georgia Institute of Technology, 1994
- Master of Architecture, Georgia Institute of Technology, 1994
- Bachelor of Science, Architecture, University of Michigan, 1991
- Fellow, American Institute of Certified Planners

Affiliations

- Member, American Planning Association
- Member, Downtown Lexington Corporation
- Former Board Member, Neighbors of Montclair, Downtown Lexington Management District
- Kentucky Chapter / APA Treasurer, 2009-2014
- Georgia Planning Association, Vice President of Chapter Services, 2006-2007

Stan directs the Urban Design & Planning practice and the regional office in Lexington. He has over thirty years of experience, building upon both his background in architecture and city planning and his work for the City of Atlanta in the years preceding the 1996 Olympics.

Stan has served on numerous firm projects, including campus/precinct studies, downtown plans, neighborhood plans and transportation/land use studies. His specialty is conceptualization of planning processes, facilitating community participation, directing facility and infrastructure programs, and developing implementation strategies.

Project Experience

Greenway Management Plan Update

Lexington Fayette Urban County Government, Lexington, KY

Town Branch Commons / Rupp District

Lexington Fayette Urban County Government, Lexington, KY

Arboretum Master Plan

University of Kentucky, Lexington, KY

Cardinal Valley Small Area Plan and Oxford Circle Redevelopment Feasibility Study

Lexington Fayette Urban County Government, Lexington, KY

Community Action Council Facilities Master Plan

Community Action Council, Lexington, KY

Lexington Legends Baseball Stadium Feasibility Study

Lexington Legends, Lexington, KY

Man O' War Boulevard / Harrodsburg Road Property Assessment

Webb Companies, Lexington, KY

Grow Smart Plan

Fayette Alliance, Lexington, KY

Lexmark Land Planning

Lexington, KY

North Limestone Sustainability Plan

N. Limestone Community Development Corporation, Lexington, KY

Armstrong Mill Road West Neighborhood Small Area Plan

EHI Consultants, Lexington, KY

East End Neighborhood Plan

EHI Consultants, Lexington, KY



Jordan Sebastian ASLA, PLA
Landscape Architect

Credentials

- Professional Landscape Architect: KY (936), MD (0004311), VA (002216)
- Master of Landscape Architecture, University of Michigan, 2012
- Bachelor of Science, Landscape Architecture, University of Kentucky, 2010

Affiliations

- American Society of Landscape Architects
- KY Chapter ASLA Executive Committee: Past President

Awards

- Town Branch Water Walk, American Planning Association, Kentucky Chapter, Outstanding Use of Technology: Civic Engagement, 2016
- American Society of Landscape Architects Merit Award, 2010

Jordan is a landscape architect project manager with a background in community planning, non-motorized trail systems, urban design and landscape architecture. His professional experience includes a wide range of project types, including but not limited to: detailed site plans, master planned communities, athletic complex design, streetscape design, historic preservation, and private and public amenity spaces.

Jordan has experience in all phases of the design and construction process, from concept and schematic design, through construction administration.

Project Experience

Greenway Management Plan Update

Lexington Fayette Urban County Government, Lexington, KY

Town Branch Commons / Rupp District

Lexington, KY

Arboretum Master Plan

University of Kentucky, Lexington, KY

North Broadway Median Improvements

Lexington Fayette Urban County Government, Lexington, KY

Winburn Small Area Plan

Lexington Fayette Urban County Government, Lexington, KY

Meadowthorpe Landing Affordable Senior Housing

AU Associates, Lexington, KY

Oasis at Kearney Creek Affordable Senior Housing

AU Associates, Lexington, KY

Polo Club Affordable Senior Housing

AU Associates, Lexington, KY

Lexington VA Medical Center Apartments

Lexington Downtown Development Authority, Lexington, KY

Lextran Property - Loudon Avenue Development Plan

Lexington, KY

RD1 Distillery Fit-up

RD1 Spirits, Lexington, KY

1301 West Main Street Mixed Use

Turner Developments, Lexington, KY

Turner Commons Development Plan

Turner Developments, Lexington, KY



Kevin Kinney ASLA, PLA
Landscape Architect

Credentials

- Professional Landscape Architect: KY [1020]
- Bachelor of Landscape Architecture, Iowa State University, 2017

Affiliations

- American Society of Landscape Architects

Awards

- American Society of Landscape Architects Student Merit Award, 2016

Kevin is a landscape architect with a strong background in parks and recreation and urban design focusing on community engagement. His professional experience spans a wide range of project types, including sustainable streetscapes, urban plazas, schoolyards, playgrounds, park planning, and amenity spaces. He has gained experience designing for the public realm on projects of varying scale from small urban spaces to large-scale park master planning.

Project Experience

Greenway Management Plan Update

Lexington Fayette Urban County Government, Lexington, KY

Turner Commons Development Plan

Turner Developments, Lexington, KY

Delta Gamma Sorority House

Delta Gamma Sorority - University of Kentucky Chapter
Lexington, KY

RST Charlottesville

RST Development Group, Charlottesville, VA

RD1 Distillery Fit-up

RD1 Spirits, Lexington, KY

North Broadway Median Improvements

Lexington Fayette Urban County Government, Lexington, KY

1301 West Main Street Mixed Use

Turner Developments, Lexington, KY

Castlewood Schoolyard ^{IE}

New York City Department of Parks and Recreation
Glen Oaks, NYC

Rockaway Beach 98th Playground ^{IE}

New York City Department of Parks and Recreation
Far Rockaway, NYC

Yocom Park Master Plan ^{IE}

City of Chariton
Chariton, IA

Raccoon River Park Master Plan ^{IE}

City of West Des Moines
West Des Moines, IA

IE - Individual Experience with Another Firm



RICHARD YOUNG (CIVICLEX)

Founder + Executive Director

As founder of CivicLex, Richard Young has grown the organization from no staff to eight full-time staff, reaching 100k+ residents annually with a \$700k+ annual budget. He has led fundraising of over \$5M from various philanthropies, including Knight Foundation, Rockefeller Foundation, Porticus, Omidyar Network, Walton Family Foundation, and the National Endowment for the Arts. He is responsible for all aspects of the organization's growth and development, including board governance, long-term vision and strategy, financial management, human resources and organizational administration, program design and creation, and more. He led the creation of all programs from scratch, including Kentucky's first-ever Civic Artist in Residence program, a collaborative journalism fund supported by the Lenfest Institute and Facebook Journalism Project, a first-of-its-kind locally-focused K-12 civics curriculum, and more.

Since its founding, CivicLex has hosted over 1,000+ civic education workshops, events, and community conversations and published hundreds of articles that have been read/used hundreds of thousands of times. CivicLex is now a nationally-recognized best practice in the fields of local news, civic education pluralism & bridge building, co-governance, and more. CivicLex's work has been cited by numerous leaders in the Democracy space as a solution for rebuilding democracy for the 21st Century, including the Allen Lab for Democracy Renovation at Harvard, New America, the Library of Congress, and the American Academy of Arts & Sciences.

OTHER SELECTED RELEVANT EXPERIENCE

North Limestone Community Development Corporation, Co-Founder & Executive Director

From 2013 to 2016, Young led the organization, growing it from no operating budget to \$1M annual operating and programmatic budget in 2015. He raised more than \$4M in grant funding in 2.5 years, including investments from the Knight Foundation, Kresge Foundation, ArtPlace America, and the National Endowment for the Arts, and more. Young designed and launched several programs including affordable housing development, multiple neighborhood planning initiatives, creation of public art, programming of public spaces, stormwater remediation programs, and multiple neighborhood granting programs. He also led creation, research, and authorship of a multi-year community development master plan with the community, focused on equitable cultural redevelopment strategies; and facilitated creation of new city zoning classification (PUD-2) and first-ever municipal funding for a neighborhood-focused CDC in Lexington.

Kentucky Rural-Urban Exchange, Founding Steering Committee Member

Since 2015, Young has served as a steering committee member for the nation's foremost network examining rural-urban interdependence and community cohesion. He is currently serving as co-lead evaluator for National Endowment for the Arts-supported Case Studies and lead for Bush Foundation-funded adaptation in Minnesota.

VOLUNTEER CIVIC PARTICIPATION

LION Publishers, Board Member	2015-Present
University of Kentucky Gaines Center for the Humanities, Board Member	2019-Present
Public Art Commission, Lexington-Fayette Urban County Government, Member	2019-Present
Central Music Academy, Board Member	2019-Present
Lexington Census 2020 Complete Count Committee, Chair	2019-2021
Infill & Redevelopment Commission, Lexington-Fayette UCG, Member	2018-Present
Chamber Music Festival of Lexington, Board Member	2017-Present

EDUCATION

University of Cincinnati, College-Conservatory of Music Bachelors of Music, Double Bass Performance, 2011.

AWARDS, PROFESSIONAL ACKNOWLEDGEMENTS

Ashoka Fellow (2025 - Present)
Fellow, Bertelsmann Foundation (2024)
Advisor, Trust for Civic Life (2023)
Emerging Leader, Institute for Nonprofit News (2023)
Vanguard, NextCity (2022)
Marshall Memorial Fellow, German Marshall Fund of the United States (2019)
Emerging City Champion, Knight Foundation & 8-80 Cities (2016)
Community Innovation Fellow, University of Kentucky (2015)



KIT ANDERSON (CIVICLEX)

Deputy Director

As Deputy Director, Kit Anderson manages and implements special projects, including public engagement and field building contracts. She oversees and manages daily operations, including budgets, compliance, and administration. Anderson manages and implements CivicLex programming focused on civic transformation and institutional reform, representing CivicLex in national and local partnerships and stakeholders, collaborate on programming, development, and communications, including on programs for civic education, news and reporting, social cohesion, research, and community engagement. She brings experience in public engagement and outreach, stakeholder engagement, survey creation, web design, qualitative research, project management, statistical analysis, GIS, and resource creation.

EDUCATION

Macalaster College, Bachelor of Science, 2017.



HALEY WARTELL (CIVICLEX)

Communications Specialist

Haley is responsible for all communications at CivicLex, creating and planning social media and email marketing content, creating print materials, managing website and email content, and creating presentations. Haley also assists with K-12 Work, teaching workshops and facilitating community organizations to visit public high schools. Accomplishments include a rebrand of the organization in 2023, creating print guides for the upcoming election year, and developing

EDUCATION

Colorado State University, Bachelor Science in Natural Science, Concentration in Biology, 2022.



LILLY BRAMLEY (CIVICLEX)

Project Specialist

Lilly collaborates with the Deputy Director on consulting tasks and special projects, ensuring alignment with CivicLex's strategic goals and mission, and contributing to the success of key initiatives. She often leads public outreach campaigns, including events with attendance in the hundreds, strengthening community relationships, awareness, and trust. Accomplishments include coordinating and executing events such as Walk to a Park Day and Bluegrass River Run at Kelleys Landing, overseeing planning, logistics, and on-site management to ensure seamless event experiences.

She develop marketing strategies in collaboration with the Communication Specialist, to promote upcoming events, programs, and projects, with a focus on expanding reach and engagement. Lilly has conducted comprehensive research, including public surveys and field observations, to provide analytical insights and produce detailed reports for Lexington-Fayette Urban County Government (LFUCG) Boards and Commissions, informing critical decision-making.

EDUCATION

University of St. Andrews, Master of Research, Social Anthropology, 2022.
University of Kentucky, Bachelor of Arts, English and Anthropology, 2020.



EDWARD HOLMES
PRESIDENT

Edward Holmes is a certified planner with over 35 years of experience focusing on incorporating sustainable planning strategies into redevelopment, master planning, environmental justice, and land use plans. As an urban planner and Principal in EHI Consultants, Ed has created sustainable development frameworks that provide benchmark considerations for future environmentally responsible planning and sustainable neighborhoods. Ed has direct experience with numerous public sector and private-sector projects throughout the Southeast United States.

SPECIALTIES: Urban planning / urban design, comprehensive planning, zoning and subdivision regulation plans, neighborhood plans, housing market studies, community engagement and outreach. He has been recognized by the Kentucky Chapter of the American Planning Association and the Kentucky Chapter of the American Society of Landscape Architects for his planning efforts in comprehensive and neighborhood planning, environmental justice and farmland preservation.

EDUCATION

University of Cincinnati
Bachelor of Arts, Urban Planning & Design

PROFESSIONAL AFFILIATIONS

American Planning Association

PROJECT EXPERIENCE

Douglass Pool Engagement, Lexington, Kentucky
Splash! at Charles Young Park, Lexington, KY
Lexington Parks Master Plan, Lexington, Kentucky
Aquatics Master Plan, Lexington, Kentucky
Davis Park Park Plan, Lexington, Kentucky
Monk to Mill Greenway & Multi-use Trail, Rocky Mount, North Carolina
Armstrong Mill Small Area Plan; Lexington/Fayette County, Kentucky
Greenway Manual Update, Lexington, Kentucky
Legacy Trail Phase I & III, Lexington, Kentucky
South Park Urban Village Plan; Lexington/ Fayette County, Kentucky
East End Small Area Plan; Lexington/Fayette County, Kentucky
West Side Neighborhood Plan; Paris/Bourbon County, Kentucky
Newtown Pike Extension; Lexington/Fayette County, Kentucky
Franklin Kentucky Comprehensive Plan; Franklin, Kentucky
Bourbon County Comprehensive Plan; Bourbon County, Kentucky



RYAN HOLMES
PROJECT MANAGER

Ryan has over 13 years of experience in land use public outreach and regulatory planning. Moreover, Mr. Holmes’ responsibilities focus on master planning, sustainable/green design, and greenfield/brownfield redevelopment strategies, which emphasize community revitalization, quality of life, and economic development. He has played a key role for numerous green and sustainable municipal stormwater projects involving capital improvement planning and design, water quality planning, watershed management, and storm water management and planning. He has provided technical expertise in low impact development (LID), green infrastructure (GI), and stormwater best management practice (BMP) design and has the ability to conceptualize and develop innovative solutions to complex problems.

EDUCATION

University of Louisville
Bachelor of Science, Business Administration

University of Cincinnati
Master of Business Administration

University of Cincinnati
Master of Community Planning

PROFESSIONAL AFFILIATIONS

American Planning Association

PROJECT EXPERIENCE

Comprehensive Opportunity Assessment, Lexington, Kentucky

Shillito & Southland Parks Parking Lots, Lexington, Kentucky

Brighton Trail, Lexington, Kentucky

Town Branch Commons, Lexington, Kentucky

Town Branch Park, Lexington, Kentucky

Davis Park Plan, Lexington, Kentucky

Franklin Kentucky Comprehensive Plan; Franklin, Kentucky

Elizabethtown Comprehensive Plan; Elizabethtown, Kentucky

Armstrong Mill Small Area Plan; Lexington/Fayette County, Kentucky

Winburn/Russell Cave Neighborhoods Plan; Lexington/Fayette County, Kentucky

Cynthiana, Harrison County, Berry Comprehensive Plan; Harrison County, Kentucky

West Side Neighborhood Plan; Paris/Bourbon County, Kentucky

Ohio River Bridge Project; Louisville Kentucky and Southern Indiana

Airport Master Plan Louisville international Airport (SDF); Louisville, Kentucky

University of Louisville Master Plan; Louisville, Kentucky



Richard B. Singer, Senior Director of Consulting Services

Richard Singer first joined the National Golf Foundation (NGF) consulting staff in 1989 after completing his Finance MBA at the University of Florida and was named Director of Consulting Services in 1997 and Senior Director in 2015. Mr. Singer has successfully managed the NGF's well-known golf consulting practice with an industry-respected track record of success and a reputation for delivering projects on time and on budget. Mr. Singer is now widely viewed as the leading municipal golf facility consultant available in the United States.

Experience

Mr. Singer's background includes hands-on experience in the following functional areas:

- | | | |
|-------------------------------------|----------------------------|--------------------------|
| -Golf Facility Feasibility Analysis | -Financial Analysis | -Golf Business Valuation |
| -Golf Operations Consulting | -Business Plan Preparation | -Golf Market Analysis |
| -Economic Impact Analysis | -Clubhouse Programming | -Golf Club Marketing |
| -Golf Course Master Planning | -Public Presentations | -Proposal Writing |

Golf Facility Operations and Marketing Consulting – Mr. Singer's golf facility operations consulting assignments comprise all aspects of golf facility operations, with focus on improving profitability through revenue enhancements, improved marketing and expense control. A significant aspect of golf operations consulting in the 2010s has been finding ways to preserve failing golf courses through physical and marketing enhancement, as well as considerations for assistance in re-purposing golf courses to some alternate (non-golf) use.

Key Accounts Managed

Selected public sector clients in 2016-2024 include: Federal City, D.C. (3-facility review of operations and capital planning); State of Georgia (7-course review of operations and outsource assistance); City of Dayton, OH (3-facility operations review and re-purpose considerations); United States Air Force (On call to review golf operations); City of Detroit (4-course strategy to keep City courses open); Town of Oro Valley, AZ (golf reduction / partial re-purpose plan); Jekyll Island Authority, GA (golf master plan preparation); PenMet Parks District, WA (golf facility operations and lease review); Town of Mooresville, NC (Strategic Planning); Borough of Sea Bright, NJ (beach/pool club development); City of Coronado, CA (GC performance benchmarking); the City of Aurora, IL (new investment feasibility); Forest Preserve District of Cook County, IL (11-course operations / sustainability review). These public sector projects include extensive participation in public meetings and a defense of project work.

Representative regional market and economic impact clients in 1999-2024 include: the State of West Virginia (Statewide 'Golf Trail' study); Golf Tourism Solutions (Myrtle Beach Regional EIA); States of Oklahoma, Colorado, Oregon, Massachusetts, Michigan, New Hampshire, Minnesota (Statewide Economic Impact Study); Bonita Bay Properties; *Golf 20/20* – Raleigh-Durham MSA Study; GATX Capital Golf Group; C. Cabot Incorporated; Gunster, Yoakley, Valdes-Fauli & Stewart, P.A.; Public Finance Consultants Inc.; and Morgan Stanley – Dean Witter.

Background/Education

Mr. Singer is a long-time resident of Palm Beach County, Florida and grew up around the North Palm Beach Country Club. He earned his Bachelor's degree in marketing and Insurance from the University of Florida in 1985 and worked as a financial consultant for Northwestern Mutual Life and Baird Securities before earning an MBA in Real Estate Finance from the University of Florida in 1989. Mr. Singer is a Licensed Real Estate Broker in Florida (Lic. #BK3077126) and is a member of the Palm Beach County Sports Commission and the Citrus Bowl Committee.



Edward Getherall, Senior Associate Consultant

Ed Getherall joined the NGF Consulting staff as Project Analyst in 2000 after several years of subcontracting consulting services to the NGF. Mr. Getherall, who was promoted to Senior Project Director in 2001 and Director of Consulting Services in 2015, has been instrumental in cementing NGF Consulting's status as the leader in municipal golf facility consulting, with a particular focus on improving municipal golf course marketing and making smooth transitions to alternative operating structures for their golf systems.

Mr. Getherall has also directed NGF's effort to be the leading industry resource for accurate golf market information pertaining to facility activity levels, revenue center performance, and green fee levels and trends. Since joining NGF Consulting, Mr. Getherall has become a respected industry authority on food & beverage operations, clubhouse renovation / replacement, municipal golf management alternatives, outsourcing assistance (RFP preparation / analysis of responses / contract negotiations), and other areas of expertise.

NGF Consulting Projects Experience

Mr. Getherall's extensive business and marketing background has enhanced NGF Consulting's ability to provide expertise to the facility segment of the golf industry. With over 25 years in NGF's Consulting division, Ed has been the lead project director for more than 150 consulting assignments, covering a broad range of services, including public and private golf course feasibility studies, acquisition studies, operations reviews, golf-related real estate absorption analyses, pricing / market positioning analyses, and clubhouse renovation studies.

Partial List of Clients

City of Houston, TX	City of Palm Springs, CA	Union League of Philadelphia
Toll Brothers Golf, PA	City of Palo Alto, CA	Google (Planetary Vent.), CA
City of Alameda, CA	Presidio Trust, CA	State of California Parks
City of Omaha, NE	City of Yonkers, NY	City of White Plains, NY
City of New York, NY	City of San Diego, CA	Woodbridge Township, NJ
Fairfax County, VA	City of Portland, OR	Federal City Council, D.C.
Miami-Dade County, FL	Ft. Belvoir GC (U.S. Army), VA	Palm Beach County, FL
City of Concord, CA	Municipality of Anchorage, AK	City of Reno, NV
City of Lake Havasu, AZ	City of Tempe, AZ	City of Oakland Park, FL
Kealahou Ahupua'a 2020, HI	City of San Francisco, CA	US Dept. of Defense, D.C.
City of Mission Viejo, CA	Mecklenburg County, NC	Santa Clara County, CA

Background/Education

Prior to joining the NGF, Mr. Getherall held several positions in the business community including extensive marketing work for such organizations as South Florida Blood Banks, Inc., the Florida Lottery, and the American Cancer Society. His areas of expertise cover a broad spectrum of marketing activity, including research, product management, and special event planning and consulting.

Mr. Getherall earned his M.B.A. from the University of Florida with a concentration in finance. Ed also achieved his undergraduate degree at Florida with a B.S. in Business Administration (Marketing). With a diversified educational and professional background in both marketing and finance, Mr. Getherall has the experience and knowledge to assist in all aspects of golf facility management, marketing, operations, and development.



Bill Golden, Senior Associate Consultant

Bill Golden brings more than two decades of leadership experience in golf, tourism, and business development, with a proven record of building coalitions and delivering measurable growth in the game and the business of golf. He has led major destination marketing organizations, guided cooperative golf initiatives, and advised facilities, municipalities, and associations on long-term strategy, revenue generation, and consumer engagement.

As the longtime leader of golf marketing in Myrtle Beach, one of the world's most successful golf destinations, he directed programs that strengthened the region's position as the "*Golf Capital of the World*," driving record levels of play and measurable economic impact. He has also been instrumental in projects such as the Oklahoma Golf Trail and Golf Prince Edward Island, helping shape sustainable models for cooperative golf marketing, corporate partnerships, and technology-driven consumer engagement.

With deep expertise in golf tourism, facility consulting, and economic development, Bill has earned a reputation as a consensus builder who brings diverse stakeholders together for shared success. He now applies this experience in support of NGF clients, with a focus on facility consulting, municipal golf initiatives, and economic impact studies.

Background/Education

Bill is a graduate of Villanova University. He is an avid golfer and outdoor enthusiast, based in South Carolina and soon relocating to Florida to continue his work with NGF.



Jodi Reilly, Research Business Manager

With thirteen years' client services experience at the National Golf Foundation and more than 17 years of golf facility experience, Mrs. Reilly brings extensive knowledge of municipal, upscale public, semi-private and private club experience to NGF Consulting. She currently manages support services for the Consulting / Research division and specializes in coordinating responses to government Requests for Proposals (RFPs) and the administrative aspects of contract compliance. Mrs. Reilly provides assistance in market research and

prepares GolfMAP statistical reports for NGF members and clients.

Background and Education

Prior to joining the NGF, Mrs. Reilly held several positions in the Philadelphia Section including: owning the pro shop at Twining Valley Golf & Fitness Club, Dresher, PA; Golf Operations Concierge at Philadelphia Cricket Club, Flourtown, PA; Buyer and Outing Coordinator for Blue Bell Country Club, Blue Bell, PA; Marketing Director for Center Valley Club, Center Valley, PA. In 1997, she earned a Bachelor of Science degree in Graphic Design from the Pennsylvania College of Technology.

**EDUCATION**

Purdue University, Bachelor of Science in Landscape Architecture. 1994.

KEVIN H. HARGRAVE **+Golf Course Architect**

After graduating from Purdue University with a degree in Landscape Architecture, Kevin began his career spending 3 years as a Construction Superintendent for a national Golf Course Contractor working on both new projects and renovations in Michigan, Ohio, Georgia, Nebraska & Wisconsin. In July of 1996, Kevin was hired by renowned Golf Course Architect, Keith Foster specializing in the renovation & restoration of classic golf courses throughout the United States. Within a span of three years, Kevin became the lead and sole Design Associate of his firm. For 30 years now, Kevin has worked closely with Keith and has played an active role in both the design, renovation & restoration of over 70 golf courses designed by some of the great architects of all time such as Donald Ross, A. W. Tillinghast, Harry Colt & Hugh Alison, Perry Maxwell, C. B. MacDonald, Seth Raynor, Dick Wilson, Walter Travis, Herbert Fowler & Willie Dunn Jr. Many of these courses are high profile and have hosted a total of over 40 National Championships since their inception.

Due to Kevin's unique partnership with Keith Foster along with Keith's desire to limit the amount of Programs his firm takes on to only 1 - 2 per year, in February of 2005, Kevin established his own firm. Since then, Kevin has developed his own clientele in conjunction with his continued association with Keith and his projects. Kevin's portfolio & existing clients currently sits at over 30. Kevin is involved in all aspects of the design process including (but not limited to) following Job Leads, Consultations, Site Surveys, Committee Meetings, Project Design, Defining Scope, Budget Numbers, Master Plan Development, Preliminary Cost Estimates, Presentations, Preparation of Construction Documents, Specifications, Bid Coordination, Bid Analysis, Construction Administration, Program Management & Construction Review.

SELECTED RELEVANT PROJECTS

Lexington Country Club Master Plan and Renovation
Lexington, KY | 2023

Meadowbrook Country Club Master Plan and Renovation
Ballwin, MO | 2021

Mission Hills Country Club Master Plan and Renovation
Mission Hills, KS | 2021

The Silo Club Master Plan and Renovation
Nevada, IA | 2025

Anthem Country Club Renovation
Henderson, NV | 2022-Present

Pinecrest Country Club Master Plan and Renovation
Longview, TX | 2024-Present



Counsilmán · Hunsaker
AQUATICS FOR LIFE

GEORGE DEINES

Feasibility Lead

PROFESSIONAL BACKGROUND

George has worked on over 175 aquatic facility projects spanning 34 states in his years with Counsilmán-Hunsaker. When you couple this with his 20+ years of municipal aquatic experience, he understands the need for and operation of municipal aquatic centers, whether they are indoor or outdoor, competitive or leisure. George has used this experience to speak on a variety of topics related to aquatics at national conferences such as the Association of Aquatic Professionals, Athletic Business, the National Recreation and Park Association, NIRSA and the World Waterpark Association, and has spoken at state conferences in Arizona, Arkansas, Illinois, Michigan, Nevada, Oklahoma, Texas, Virginia, Washington, and Wisconsin.

NOTABLE PROJECTS

City of Yukon (Audit) – OK
 City of Richland Hills (Study) – TX
 City of West Memphis (Study) – AR
 Coronado Aquatic Center (Study) – CA
 Covington Recreation Center (Study) – Opelika – AL
 Derry Aquatic Center (Business Plan and Study) – PA
 Doral Aquatic Center (Study) – FL
 Eanes ISD – Westlake High School (Study) – Austin – TX
 Henderson Aquatic Center (Study) – KY
 Jackson County Recreation Center (Study) – Cullowhee – NC
 Keiser University (Study) – West Palm Beach – FL
 Kiwanis Pool (Study) – Portland – ME
 Manhattan Aquatic Center (Study) – KS
 Marilla Pool (Study) – Morgantown – WV
 Patagonia High School Pool (Study) – AZ
 Rohner Recreation and Park District (Study Update) – Fortuna – CA
 Springfield Downtown YMCA (Study) – OH
 Topton Pool (Study) – PA
 Trophy Club Community Swimming Pool (Audit) – TX
 University of Tennessee – Martin – Elam Center Competition Pool (Audit) – TN
 Village of Waunakee Aquatic Center (Study) – WI

CONFERENCE SPEAKING

Developing your Aquatic EAP: Essential Aquatic Philosophies –
 Illinois Park and Recreation Conference, 2022

Finding Success with Five Types of Aquatic Employees –
 Michigan Park and Recreation Conference, 2021

*Conversing with Council, and Developing your Aquatic EAP:
 Essential Aquatic Philosophies* – Texas Park and Recreation Conference, 2021

EDUCATION

University of North Texas
 Bachelor of Arts – 2000

Dallas Theological Seminary
 Master of Arts – 2006

YEARS OF EXPERIENCE

With Counsilmán-Hunsaker
 2014 – Present

PAST EXPERIENCE

2007–2014:

Aquatics Manager
 City of Garland, TX
 Parks, Recreation &
 Cultural Arts Department

2000–2007:

Aquatics Coordinator
 Aquaducks Head Swim Coach
 City of Plano, TX
 Parks and Recreation Dept.

CERTIFICATIONS

Certified Pool Operator – PHTA

PUBLICATIONS

“Setting The Value of Municipal
 Aquatic Centers.” World
 Waterpark. June 2021: 30:35

“COVID 19 Challenges Summer
 Pool Programs.” Texas Recreation
 and Park. Nov 2020: 26:28

“The Three S’s – Key to a Successful
 Aquatic Operation.” Park and Rec
 Business. April 2020: 20:23



JASON MORADO

Senior Project Manager

ETC Institute

725 W. Frontier Circle, Olathe, KS 66061

jason.morado@etcinstitute.com

(913) 254-4514



EDUCATION

M.B.A., Webster University, 2009

B.S. in Business Administration – Marketing, Avila University 2000

SUMMARY OF EXPERIENCE

Mr. Morado has over 17 years of experience in the design, administration, and analysis of community market research. He has served as the project manager on community survey research projects for over 500 local governmental organizations throughout the U.S. Mr. Morado is experienced in all phases of project management of market research studies, including survey design, developing sampling plans, quantitative and qualitative analysis, interpretation of results and presentation of findings. His areas of emphasis include citizen satisfaction surveys, parks and recreation needs assessment surveys, community planning surveys, business surveys, and transportation studies. He has also led the coordination and facilitation of focus groups and stakeholder interviews for a wide range of topics.

RELEVANT PROJECT EXPERIENCE

Citizen Satisfaction Surveys

Mr. Morado has served as a project manager for over 200 citizen satisfaction surveys for local governmental organizations. Some of these organizations include:

- Addison, TX
- Atchison, KS
- Arlington County, VA
- Bensenville, IL
- Cabarrus County, NC
- Camas, WA
- Cedar Hill, TX
- Clayton, MO
- Coral Springs, FL
- Creve Coeur, MO
- Davenport, IA
- Durham, NC
- Durham County, NC
- Elgin, IL
- Enterprise, AL
- Fayetteville, NC
- Gardner, KS
- Greenville, NC
- High Point, NC
- Henderson, NV
- Hyattsville, MD
- Independence, MO
- Jackson, MO
- Johnston, IA
- Kirkwood, MO
- Las Vegas, NV
- Lawrence, KS
- Manassas, VA
- McAllen, TX
- Meridian, ID
- Mesquite, TX
- Miami, FL
- Missouri City, TX
- Montrose, CO

**RYAN MURRAY****Project Manager**

ETC Institute

725 W. Frontier Circle, Olathe, KS 66061

rmurray@etcinstitute.com

(913) 254-4598

**EDUCATION**

B.S., Public Administration, The University of Kansas

SUMMARY OF EXPERIENCE

Mr. Murray has over 12 years of experience in survey administration, development, supervision, and research analysis. Throughout his tenure at ETC Institute Mr. Murray has had the pleasure of working on survey projects that cover a wide variety of topics, including parks and recreation, community planning, customer satisfaction, transportation, employee, library, comprehensive planning, parks and recreation master plans, water and utility, and business development. His current role as Project Manager includes survey design, developing sampling plans, quantitative and qualitative data analysis, interpretation of results, and presentation of findings. In his previous role he planned, coordinated and supervised the administration of large-scale origin-destination transportation studies on over a dozen projects throughout the country. Mr. Murray has worked as a Project Manager on projects for over 50 state, county, local, and private sector clients. Below are some examples of the clients Mr. Murray has worked for.

PARKS AND RECREATION PROJECT EXPERIENCE

Mr. Murray has served as a project manager for over 100 parks and recreation surveys for local governmental organizations. Some of these organizations include:

- Aberdeen, South Dakota
- Addison, Texas
- Albemarle County, Virginia
- Ankeny, Iowa
- Arlington County, Virginia
- Auburn, Georgia
- Austin, Texas
- Barrington, Illinois
- Beaver Creek, Ohio
- Bend, Oregon
- Berkshire Township, Ohio
- Billings, Montana
- Cape Coral, Florida
- Chandler, Arizona
- Chatham County, North Carolina
- Cincinnati, Ohio
- Coconut Creek, Florida
- Colleyville, Texas
- Corpus Christi, Texas
- Dallas County, Iowa
- Dania Beach, Florida
- Deerfield Township Ohio
- Delaware County, Ohio
- Denver, Colorado
- Derby, Kansas
- Downers Grove, Illinois
- Dundee, Illinois
- Durango, Colorado
- Eau Claire, Wisconsin
- Edgewater, Colorado
- Elon, North Carolina
- Estero, Florida



4 Proposed Approach

Introduction

The PP+D Team has reviewed the Scope included in the Lexington-Fayette Urban County Government (LFUCG) RFP and find it to be similar to the Scope that the PP+D Team has used to collectively complete over 500 Parks and Recreation Master Plans for agencies throughout the United States.

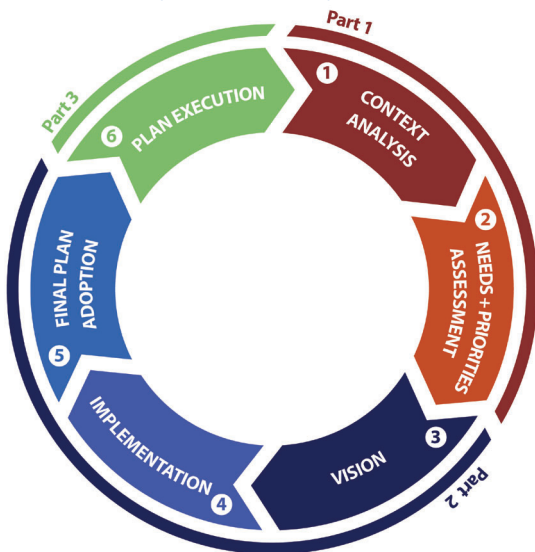
We have organized all of the LFUCG's proposed scope items under our unique, proven process that we've refined over the last 20 years based on our extensive experience, which we continue to adapt to the values and needs of the communities that we work with.

The PP+D Team's process integrates seamlessly with the LFUCG's proposed two phased approach to the project. To avoid confusion in the following approach, we are rephrasing the LFUCG's desired Phase 1 and Phase 2 to Part 1 and Part 2.

We actually prefer this 2-Part Approach as it provides an opportunity to confirm identified parks and recreation needs and priorities before proceeding to discuss the LFUCG's appropriate response to the identified parks and recreation needs and priorities.

Below is a diagram of how our proven phased approach aligns with the LFUCG's 2-Major Parts. Specifically, it illustrates our primary 5 phases, which ultimately lead to a 6th phase based on the recommendations of the Plan. As illustrated by the circular shape of the diagram, in 5 to 10-years, the process starts all over again when the LFUCG updates the Parks and Recreation Master Plan.

PP+D's Proven Parks and Recreation System Planning Process Diagram



This approach is grounded in a time-tested and well-respected approach to parks and recreation system planning, supported by research into innovative methods and the latest thinking in the parks and recreation industry.

For the LFUCG's consideration, we also recommend adding a few tasks that we have found to be important. These are identified in *blue italicized text* in the following pages. Specifically, these tasks serve to achieve the following:

- Maximize project recognition and increase public engagement.
- Ensure inclusive and meaningful participation from residents, businesses, and other key groups, including park users as well as non-park users.
- Ensure an actionable and achievable plan that does not sit on the shelf and is aligned with the City's long-term goals.
- Ensure buy-in and adoption of the plan by LFUCG leaders and elected officials.

Prior to commencing the project, should the PP+D Team be fortunate to be selected for the project, we would be happy to conduct a "Scoping Workshop" - at no cost to the LFUCG - to review and discuss the project scope to make sure that it meets the LFUCG's specific needs.

PP+D takes pride in being very flexible and nimble with our Clients. If throughout the project the City learns that it is more beneficial for the project that we move, replace, remove, or adjust tasks, we are happy to do it to ensure that the LFUCG is happy with the Plan. ***Ask any of our Clients, PP+D never asks for Additional Services.***

The following pages contain a detailed description of our proposed Scope of Work. Deliverables per phase are discussed in Section 6 - Deliverables.



Proposed Scope of Work

Beginning of the LFUCG's Proposed Part 1 Phase 1 – Context Analysis

Phase I is designed to establish a strong foundation for the parks and recreation master planning process through the analysis of three Contexts:



Planned Context - Review of previous LFUCG planning studies.



Demographic Context - Review of LFUCG's existing and projected demographics.



Park System Context - Assessment of the existing conditions of the parks system.

Following are the tasks that PP+D proposes to complete for Phase 1-Context Analyses.

1.1 Project Management + Coordination: PP+D will coordinate our work with the LFUCG's Project Manager. PP+D will hold regular bi-weekly meetings with LFUCG Staff to review progress, present information, and discuss the direction of remaining portions of the project. It is envisioned that one of the bi-weekly meetings will include a meeting with City Administration to provide an update of the process.

In an effort to keep the project on schedule, we have found that pre-scheduling project milestone dates such as deliverable submittal dates, LFUCG review periods, public engagements, presentations, etc., is key to the project remaining on schedule. On pages 60-61, you will find a detailed preliminary draft project schedule for the LFUCG's review. We are happy to revise this schedule per the LFUCG's desires.

1.2 Project Branding: PP+D proposes to develop three project branding options for the LFUCG including logos, fonts, and colors and submit them to the LFUCG for review. PP+D will revise one of the selected options per the LFUCG's comments and develop a final brand for the project. PP+D will then use the logo to develop business cards for the project that can be distributed to encourage participation in the planning process. Additionally, the project brand will be included in all project documents.

1.3 Interactive Project Website: The PP+D Team will develop an interactive project website for the project. We propose using third party providers such

as Publicinput.com, Social Pinpoint, ArcGIS Survey 123 or similar that allow the project to not only have a presence in the internet but also allow visitors to provide feedback about the process as desired by the LFUCG in multiple languages.

For Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment, we envision the interactive website providing two primary exercises:

- **Interactive Map** - This exercise allows users to navigate throughout the City and provide comments related to topics desired by the LFUCG. The PP+D Team will work with the LFUCG to identify those topics.
- **Brief Introductory Survey** - The PP+D Team will work with the LFUCG to develop a brief introductory survey to collect preliminary input on the Master Plan process.

CivicLex would analyze the findings and integrate the findings into the Context Analysis Summary Report.

1.4 Lexington Parks and Recreation Staff and Executive Committee Project Kick-Off Meetings:

PP+D will complete in-person Kick-Off Meetings with Parks and Recreation Staff and the Executive Committee. The purpose of these kick-off meetings will be review the project scope, schedule, expectations, roles and responsibilities. Specifically, the Kick-Off Meeting may cover, but may not be limited to covering the following:

Project Branding Examples

PP+D has found that developing a brand for parks and recreation master plans helps with public recognition and enhances public engagement.

Below are examples of project brands that PP+D has completed for the District of Columbia; Atlanta, Georgia; and Miami, Florida. The branding was used throughout the project in documents, promotional materials, and swag such as hats, t-shirts, pens, etc.





- Documentation, and data requests, and project schedule.
- Preliminary discussion of department needs, concerns, political climate, general number and condition of existing amenities, known demographic, crime data, population health and wellness data, community health data, past planning efforts by the LFUCG, etc.
- Discuss existing reports, capital improvement plans, area plans, GIS data, mapping, and other relevant information to familiarize the PP+D Team with past efforts and current programs and determine what other information should be gathered.
- Project promotional strategies including, but not limited to traditional and digital strategies such as promotional project business cards, flyers, mailers, door hangers, restaurant table promotional tents, radio interviews, park yard signs, email blasts, social media posts, social media ads, robocalls, promotional videos, etc.

PP+D will develop a meeting summary and submit to the LFUCG for review.

1.5 City Administration Project Kick-Off Meeting:

PP+D will also complete an in-person Kick-Off Meeting with City Administration. The purpose of these kick-off meetings will be review the project scope, schedule, goals, objectives, expectations, potential issues, and concerns. PP+D will develop a meeting summary and submit to the LFUCG for review.

1.6 Parks and Recreation Advisory Board Project Kick-Off Meeting: PP+D also proposes to complete an in-person Kick-Off Meeting with the Parks and Recreation Advisory Board. The purpose of this kick-off meeting will be to introduce the Advisory Board to the project team, review project scope, schedule, expectations, roles, responsibilities and receive preliminary input from the Advisory Board about parks and recreation needs, priorities, issues, and opportunities. PP+D will develop a meeting summary and submit to the LFUCG for review.

1.7 Public Kick-off Event: *Several of our parks and recreation master plans have been “kicked-off” with a public celebration, including food, public art, dignitaries, and guest speakers.*

Miami-Dade County, for example, celebrated the initiation of their Open Space Plan through a “Green Think” celebration at Fairchild Botanical Gardens in Coral Gables, FL.

The purpose of the event was to inform the public (through attendance and media coverage) of the impending planning process; educate elected officials, stakeholders and the public regarding the importance of parks and open space to the health and sustainability of the community; and to begin building support for eventual implementation. If desired by the LFUCG, the PP+D Team can assist with the planning and organization of the Public Kick-Off Event.

1.8 Review of Existing Conditions: Parks and Recreation Master Plans are never completed in a vacuum. EHI will complete an existing plan and context review for all relevant surveys, studies, and planning documents from the LFUCG that may influence the plan provided by the LFUCG, including:

- Previous park master plans
- Park and recreation sites inventory and assessments
- Community plans and studies
- GIS data and mapping
- Survey data and information on community needs and desires

EHI will provide a brief summary of the documents to identify relevant data that may include, but may not be limited to existing and proposed goals, objectives, policies, initiatives, standards, projects, and document data matrix to help maintain an inventory of the existing information.

1.9 Demographic Analysis: Critical to meeting CAPRA Standard 10.5.1, PP+D will utilize current and projected demographic data to understand what the community looks like now and what it may look like in 5 and in 10-years.

PP+D will analyze population composition, population growth projection and trends, and socio-economic factors to prepare charts and graphs illustrating the LFUCG’s actual growth, projected growth, and community health challenges. (See The Role of Parks in Addressing Complex Community Health Challenges Call-Out Box).

PP+D will work with the LFUCG to determine appropriate data sources to use, which may include data from Environmental Systems Research Institute, Inc. (ESRI), the LFUCG and State. PP+D will look at the data by census tract, Park Planning Districts, and citywide when evaluating service areas.



The Role of Parks in Addressing Complex Community Health Challenges

PP+D believes that parks can help communities address complex social, economic, and environmental community health challenges issues such as economic equity, public safety, food access, flooding, economic development, affordable housing, etc. In fact, the urban park movement in the United States was conceived as a way to address the issues plaguing urban areas during the late 1800's including poor air quality, lack of access to sunlight, limited opportunities for exercise, and other problems associated with close urban quarters. Today, city's like Washington, D.C.; Atlanta, Georgia; and Los Angeles, California have shown how parks can help address some of the complex issues that the Lexington-Fayette Urban County Government may be facing.

Parks + Community Safety

For over 16 years, the City of Los Angeles (LA) has been using parks to combat youth gang violence in some of LA's most dangerous neighborhoods. Branded as Summer Night Lights, this program extends park hours, provides expanded programming, and employs at-risk youth during periods when youth crime has historically peaked. The first year the program was initiated, it led to the safest summer that the City had experienced since 1967.

Additionally, the program has demonstrated how funds can be better utilized to combat crime. For example, the City of Los Angeles typically spends about \$1 million trying a single homicide case from begin to end. In comparison, the Summer Night Lights program cost \$6.2 million for 32 parks, half of which is paid by philanthropic foundations and corporations.



Parks + Flooding

Another great example of how parks can address complex community issues is Historic 4th Ward Park in Atlanta, Georgia. For many years, the Historic 4th Ward neighborhood suffered from flooding during rain events. This flooding impacted resident's quality of life and stifled private investment in the neighborhood. Instead of building a \$40 Million underground tunnel that would absorb the flood waters, the City of Atlanta Department of Watershed Management collaborated with the City of Atlanta Department of Parks and Recreation, the Atlanta BeltLine, neighborhood residents, and community stakeholders to build a 17-acre, \$24 Million park that would absorb the flood waters and provide the neighborhood with a park amenity that was also desperately needed.

The park has not only addressed flooding in the neighborhood but has also led to over \$2 Billion dollars of private investment in the surrounding area.

It's case studies like these that inspire PP+D to encourage our Clients to explore how parks and recreation master plans can help with the complex social, economic, and environmental issues facing their communities. We hope that these examples, and the many more that the PP+D Team regularly shares with our Clients inspires the Lexington-Fayette Urban County Government to do the same!



Historic 4th Ward Park - Before



Historic 4th Ward Park - After



Similar to other projects that PP+D has worked on, the PP+D Team will work with Staff to organize the LFUCG into up to six (6) Park Planning Districts. The organization of these Park Planning Districts is typically primarily informed by population, population density, and infrastructure. The PP+D Team can also overlay other data sets such as demographic, socio-economic data, and findings from the Comprehensive Opportunity Assessment that Team member EHI is currently completing for LFUCG Parks and Recreation to further inform the organization of Park Planning Districts. Establishing these Park Planning Districts will be a critical step in the process and will be used to guide public engagement input and analysis of findings.

PP+D will review, identify, and summarize trends, and graphically depict key findings in charts, graphs, and narratives.

1.10 National, Regional, and Local Recreation and Leisure Trends and Market Demand Analysis:

PROS Consulting, NGF Consulting, and Counsilman-Hunsaker will develop a National, Regional, and Local Recreation and Leisure Trends Analysis as follows:

- **Parks and Recreation:** PROS Consulting will complete a Trends Analysis that provides an understanding of national, regional, and local recreational trends as well as recreational interest by age segments.

It will include but not limited to data collection and analysis, AI tools, marketing, programming and management of historically significant spaces, natural areas and naturalized spaces, recreational outreach programs, and engagement and volunteering of all ages

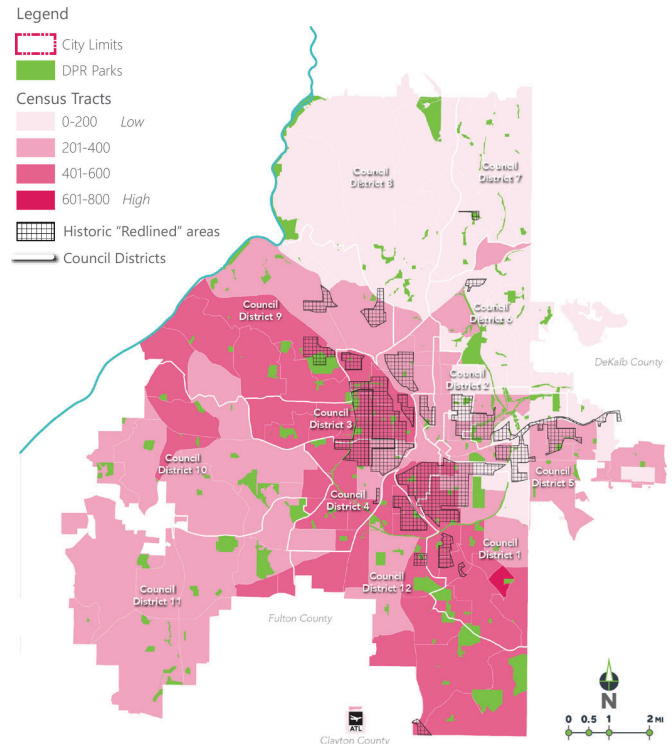
Trends data used for this analysis will be obtained from sources including, but not limited to Sports & Fitness Industry Association's (SFIA), National Recreation and Park Association (NRPA), Environmental Systems Research Institute, Inc. (ESRI), etc. Where applicable, trend data is based on current and/or historical participation rates, statistically valid survey results, or NRPA Park Metrics.

The Sports & Fitness Industry Association's (SFIA) current Sports, Fitness & Leisure Activities Topline Participation Report is also utilized in evaluating the following trends:

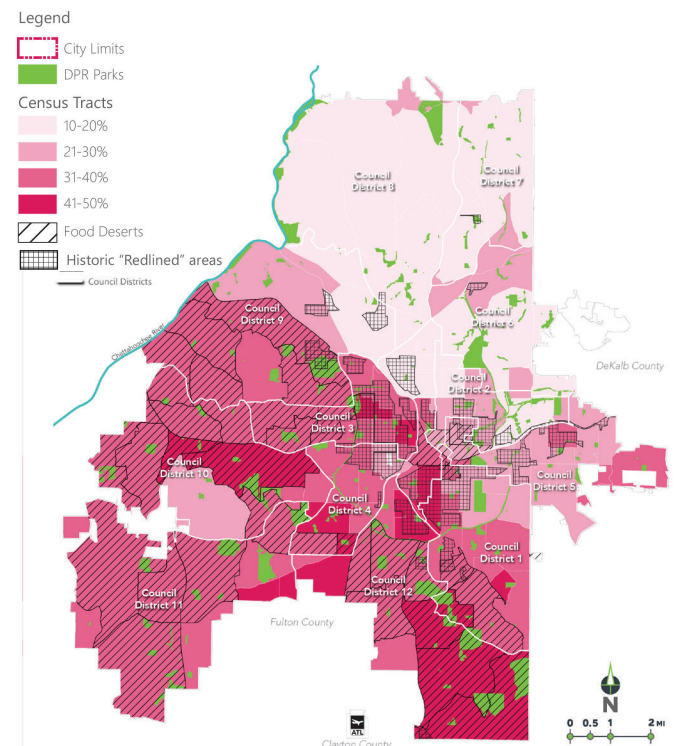
- National Recreation Participatory Trends
- Core vs. Casual Participation Trends

Examples of Community Health and Health/Wellness Indicator Data and Mapping for City of Atlanta, GA

Community Safety



Obesity Rates + Food Deserts





The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S. The study will look at 120 different sports/activities and will subdivide them into various categories including: sports, fitness, outdoor activities, etc.

- **Golf:** NGF Consulting will analyze the supply/demand dynamic that is driving the competitive public access golf market in the greater Lexington market. They will document relevant local competition in terms of relative quality, programs offered, fee structures, and trends in activity so that we can identify the appropriate programming, price, value and mix of amenities for Lexington golf facilities. They will also identify key golf participation and activity trends in the population, as well as emerging trends in golf service that may impact the continued operation of LFUCG golf facilities.
- **Aquatics:** Counsilman-Hunsaker will analyze national, regional, and local aquatics trends, including weather analysis and economic considerations that may affect the future viability of aquatics facilities. Additionally, they will study other area aquatic providers to better understand the aquatic services and facilities that are provided in the region and the fees that are being charged for those services. This information will also be used as a benchmark when comparing the services offered by the LFUCG's aquatic facilities as opposed to the similar area providers.

The PP+D Team will organize this information into a summary document with key findings.

1.11 Inventory + Base Map: Critical to meeting CAPRA Standard 10.4, the PP+D Team will work collaboratively with staff to compile a comprehensive inventory of the existing and planned parks and facilities based on data provided by the LFUCG.

EHI will use and build on the existing work with the LFUCG to develop a comprehensive inventory that includes park type, park location, acreage, the number of benchmarkable indoor and outdoor facilities and amenities in parks, existing plans, and available programs and events. EHI will also provide a GIS-based map that will illustrate the location, type of park, pedestrian, bicycle, and vehicular access.

The PP+D Team will submit the base map and inventory for the LFUCG's review to ensure accuracy and consistency and will revise according to the written comments provided by the LFUCG.

1.12 Park System Evaluation: Critical to meeting CAPRA Standard 10.4, the PP+D Team members will visit, photograph, and document the existing conditions of the LFUCG's parks and recreation system as follows:

- **Parks, Recreation Facilities, Indoor Centers, and Aquatic Facilities:** Completed by PP+D, Lord Aeck Sargent (LAS), and Counsilman-Hunsaker.
 - Prior to these visits, the PP+D Team will work with the LFUCG to review and if desired, modify our Team's Parks Evaluation Form to analyze the LFUCG's parks and recreation system, based on the expressed values of the community. The form is a result of our Team's experience in completing over 500 Parks and Recreation Master Plans nationwide and uses criteria adapted from Project for Public Spaces (PPS) methodology for evaluating the effectiveness and performance of the public space.

While completing park evaluations, the Team would randomly interview park users, dog walkers, joggers, and other residents/visitors we encounter. For example, our Team has already visited some of the LFUCG's parks and spoken to park users to get their input. The following page documents some of these interviews. We look forward to the opportunity to complete more of these intercept interviews!

- **Golf Facilities:** Completed by NGF Consulting and Kevin Hargrave Golf Course Architect.
 - NGF Consulting and Kevin Hargrave will conduct an evaluation of all five golf facilities to prepare a review of potential enhancements that could be made to: (1) improve revenue performance; (2) reduce environmental "footprint;" and/or (3) reduce expenses in the golf system operation. Key areas to review will include:
 - Golf layout, playability and quality standards
 - Maintenance practices and budget
 - Systems review – irrigation and drainage
 - Equipment, including long-term plan for replacement



Lexington Park System Intercept Interview

Jacobson Park/ Lakeside Golf Course



"Well, of course I always would like a public swimming pool and a beach for the kids. That'd be nice. But other than that, I think it's great. A little bit more seats in the shade, that would be great too."



"Our son just turned 10. We had his birthday party here and he has autism. This is a really safe space for him. He loves water, and it's all fenced in, so that feels really safe. He gets to interact with other kids at his own distance. That way he can approach them if he wants to, instead of at school, where he's kind of confined. It's always very clean. I would like there to be more seating in the park."

Valley Park



"Well, my son loves the park. I think this park is great, I'm coming from Georgetown so I don't live in Lexington, but he loves it, he's autistic so that specific swing, he loves. It's pretty clean and well maintained. As for improvements, I think fixing that area, where the tree fell, like improving and putting something else there, that would be awesome."



"What I like is there's actual swings at the park. I noticed at that new Gatton Park, there's no swings. We live a couple blocks away so it's easy to walk here. My son would really like to see a jungle area or a splash pad."

Kirklevington Park



"I like the size of the path, it's nice. It's just under a mile so during lunch break, you know, I can get at least a mile. It's really nice that they've created paths through the landscape and it's rare that you have the opportunity to walk amongst trees and tall grasses like you're like out like in the forest or something. If I were to make changes, I'm thinking about the park that they just built down by Rupp Arena. There's a water feature. Maybe it might be nice for the people that live in the neighborhood to bring their kids on a hot day, or maybe a designated dog area so people can let their dogs loose."



"More restrooms would be a good thing. It's a very well maintained park. I've noticed in my time walking here, trash is done very regularly. Mowing is great. Um, I mean, it's a good space."



- System-wide summary with list of objectives
- Long range recommendations shown as 'options' for further study

These evaluations help PP+D develop a "baseline" understanding of how well the current system functions and meets the community's needs. These findings will be illustrated at the citywide and Park Planning District levels and would be used to develop a Quality LOS map that illustrates how the quality of parks, recreation facilities, indoor centers, aquatics facilities, and golf courses compare throughout the system. Additionally, the findings would be used to provide park system capital improvements.

1.13 Recreation Program Plan: Identified as a Fundamental Standard for CAPRA Accreditation (Standard 6.1), PROS Consulting, in coordination with Counsilman-Hunsaker (CH) and the National Golf Foundation Consulting (NGF) will develop a Recreation Program Plan that will be aligned with the Parks and Recreation Master Plan. Findings from this task will inform recommendations provided in the Phase 3 - Vision and Phase 4 - Implementation.

Following are the tasks that will be completed during Phase 1 - Context Analysis:

- **Inventory and Assessment of Current Programming and Services** - PROS Consulting, in coordination with CH and NGF, will complete a comprehensive multi-stakeholder program map using their proven assessment framework that systematically analyzes all programming across relevant organizations and documents the following detailed program analysis components:
 - **Age Segment Distribution** - Program offerings across all age demographics
 - **Lifecycle Analysis** - Programs addressing different life stages and transitions
 - **Core Program Analysis** - Identification of mission-critical programming for each organization
 - **Similar Provider Analysis** - Assessment of service duplication and coordination opportunities
 - **Market Position and Marketing Analysis** - How each organization positions and promotes services
 - **Pricing Structure and Cost Recovery** - Fee analysis and financial sustainability assessment

- **Program Development Process Review** - How new programs are created and evaluated
- **Customer Satisfaction Metrics** - Participant feedback and retention analysis
- **Registration Trends** - Participation patterns and demand indicators
- **Current KPIs** - Existing performance measurement systems
- **Staff Training and Development** - Capacity and professional development assessment

The program inventory will produce a comprehensive index of all recreation offerings structured to allow annual updates and ongoing KPI monitoring. This assessment format will be customized to interface with existing organizational systems while providing cross-stakeholder comparison capabilities.

Next, PROS Consulting in coordination with CH and NGF, will ensure that recreation and service offerings are integrated with national benchmarks and community needs. This will include the following elements:

- **NRPA Standards Application** - Comparing current service levels against National Recreation and Park Association best practices for demographics and population density
- **Sports & Fitness Industry Association Trends** - Identifying emerging programming opportunities aligned with national participation patterns
- **Demographically Similar Communities** - Benchmarking against jurisdictions with comparable diversity, population density, and multi-stakeholder service delivery
- **Statistically Valid Needs Assessment** - Provides community priorities on recreation programs and facilities
- **Core Recreational Planning Principles Assessment** - PROS Consulting analysis will evaluate how well current programming aligns with fundamental recreational planning principles:
 - **Connectivity of Resources** - Integration across facilities and organizations
 - **Inclusivity and Equity** - Celebrating diversity and promoting access and opportunity
 - **Sustainability** - Infrastructure and practice longevity
 - **Program Activation** - Supporting physical, mental, and social wellness



Lastly, PROS Consulting in coordination with CH and NGF will identify unmet current and future needs in programming and services. This will include the following elements:

- **Current Needs Analysis** - PROS Consulting will assess whether the current recreation mix meets community needs by analyzing:
 - Participation rates vs. demand across demographic segments
 - Waitlists, capacity constraints, and unmet demand indicators
 - Geographic access patterns and transportation barriers
 - Cultural and linguistic accessibility of current programming
- **Future Programming Assessment** - PROS Consulting will analyze emerging needs based on:
 - Demographic projections and community growth patterns
 - National recreation trends and evolving participation patterns
 - Community input on desired programming from Task 2 engagement
 - Coordination opportunities identified through stakeholder analysis

1.14 Staffing, Operations, and Management

Assessment: PROS Consulting and NGF will complete an assessment of staffing, operations, and management for the parks and recreation system and golf and concession operations respectively. Specifically, this assessment will include the following:

- **Parks and Recreation System:** Evaluate each area of operations and focus on right-staffing not just right-sizing.
Evaluate policy and procedure to ensure consistent implementation system-wide.
Determine whether the organizational structure is aligned to the community's vision, mission and goals.
Create a functional, outcome-driven agency.
- **Golf and Concession Operations:** Complete a system-wide review of the golf and concession operations of the five-facility Lexington golf system to provide the necessary background to make proper program and facility recommendations aimed at understanding the long-term sustainability of this multi-facility golf system. This will include a global assessment

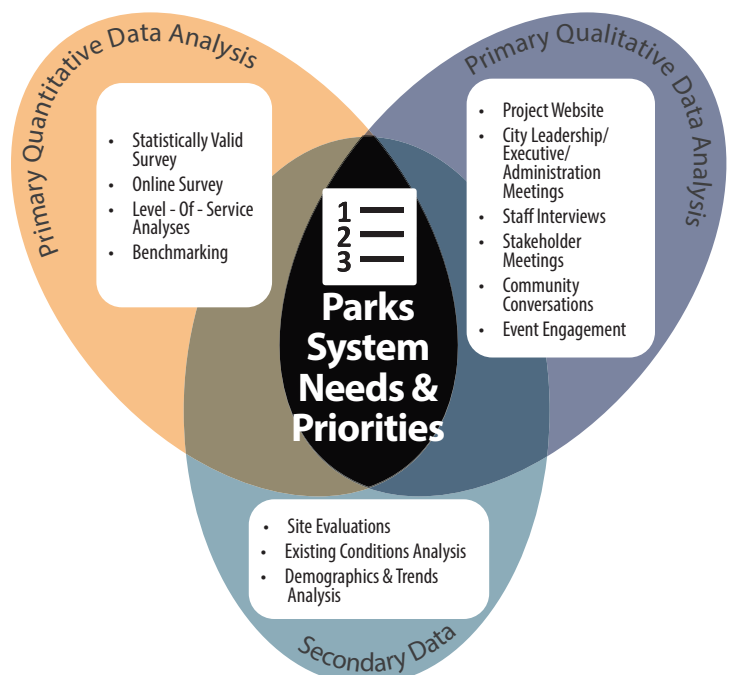
of the amenities and services that can lead to improved economic performance and long-term sustainability of Lexington golf courses. The global operations analysis will include review of:

- Staffing/personnel review and needs/duties assessment
- Financial and activity records (P&L, budgets, rounds, etc.)
- Rounds played analysis (POS review)
- Product and service offerings and market position
- Fee review (golf, carts, passes, F&B, merchandise, etc.)
- Clubhouse operations (F&B, pro shop, etc.)
- Programs in place (service, lessons, tournaments, etc.)

1.15 Context Analysis Summary Document: PP+D will compile all the information and data completed for Phase I and will develop a summary document. The Context Analysis Summary will identify major issues, concerns, challenges, opportunities, and constraints. PP+D will submit the summary document to the LFUCG for review and will make revisions per the LFUCG's written comments.

Phase 2 – Needs and Priorities Assessment

PP+D's Proven Triangulated, Mixed-Methods Approach to Needs and Priorities Assessments





Critical to meeting CAPRA Standard 10.4, we approach needs assessments using three different data analyses: primary qualitative analysis, primary quantitative analysis, and secondary data analysis. Where the findings from these data analyses intersect, suggests needs and priorities. PP+D will use this strategy to determine needs and priorities at the citywide and Park Planning District levels. The diagram below illustrates our approach.

While the secondary data analysis are covered in Phase 1, Phase 2 focuses on the primary qualitative and primary quantitative analyses. The primary qualitative analyses are all based on PP+D's philosophy for public engagement:

"Bring me in early, and I'm your partner. Bring me in late, and I'm your judge"

Our process aims to work collaboratively with the LFUCG and use a variety of techniques to promote and implement well-organized and directed activities, techniques and formats that will ensure that a positive, open, and proactive public participation process is achieved.

Following are the tasks that the PP+D Team proposes to complete for the Needs and Priorities Assessment Phase.

2.1 Meeting with Executive Committee: PP+D will conduct a second in-person meeting with the Executive Committee. The purpose of this meeting will be to collect input about parks, recreation, community health, and funding needs and priorities. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.2 Meeting with City Administration: PP+D will also conduct a second in-person meeting with City Administration. Similar to the second Executive Committee Meeting, the purpose of this meeting will be to collect input about parks, recreation, community health, and funding needs and priorities. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.3 One-on-One Meetings with City Council Members: PP+D will also conduct virtual one-on-one meetings with City Council Members. We have found that these one-on-one meetings are invaluable for obtaining candid information and insights that help inform and address the priority parks and recreation needs and opportunities within the community. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.4 Community Conversations: CivicLex and EHI will facilitate up to six community conversations, or listening sessions based on established Park Planning Districts to introduce the parks and recreation master plan and gather information about parks needs across the LFUCG. The listening sessions will be hosted in friendly, accessible locations in each district (parks, libraries, restaurants, etc.) and broadly promoted digital, print, and relational methods. The listening sessions will include open house style activities to maximize accessibility and focus on key elements of community needs (e.g. access, features, programming).

2.5 Stakeholder Meetings: CivicLex will conduct a series of approximately 15 initial focus groups with key stakeholders and parks users. These focus groups will be structured with a brief introduction on the context of the plan, followed by a facilitated conversation about different group needs and their vision for the next 10 years of parks in Lexington. Finally, each focus group member will complete a written reflection to gather direct quotes and quantitative insights. Stakeholder groups would be developed in consultation with LFUCG Parks and Recreation and project advisors, but could include people with disabilities, kids and young adults, arts and culture organizations, maintenance workers, recreation groups, or environmental groups. CivicLex could also have the capacity to convene a randomly selected focus group to work towards a representative sample of residents giving parks input.

2.6 Event Engagement: Working with the project team and advisory group, CivicLex will design creative, visually inviting, and interactive pop ups that can be implemented at different parks events and community locations. Using arts based or gamified approaches, these pop ups will invite participants to learn about Lexington's parks, share their reflections, and gather qualitative or quantitative data on the needs of different communities, geographically targeted according to each Parks Planning District. Working with Parks staff and advisors, the project team and LFUCG Staff can implement the pop ups at signature high volume parks events (e.g. St. Patrick's Day Parade, Kite Fest, Friday Flicks, Fourth of July Parade, or Dirt Bowl), in addition to more neighborhood focused events, and community locations (transit center, grocery stores, schools) that can engage future parks users.



2.7 Statistically Valid Survey: PP+D will work with ETC Institute to create a statistically valid mail survey that will provide results that have a margin of error of +/-3.1% at the 95% level of confidence at the citywide level and a margin of error of +/-8.0% at the 95% level of confidence at up to six Park Planning Districts. Following are the steps that PP+D and ETC will take to complete the Statistically Valid Survey.

Step 1: Design the Survey and Prepare the Sampling Plan:

- PP+D and ETC will work with the LFUCG to develop a questionnaire that is appropriate for the LFUCG. ETC will meet by phone with the LFUCG to discuss the goals and objectives for the project.
- To facilitate the survey design process, ETC Institute will provide sample surveys created for similar projects. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the LFUCG. The survey will be up to 6 pages in length.
- ETC will then conduct a pilot test of the survey to ensure the questions are understood by residents. Based on the results of the pilot test, ETC Institute may recommend changes (if needed) to the survey.
- Once finalized, the survey will be translated into up to 10 languages. While the printed and mailed survey will only be made available in English. The materials that are mailed will include lines in additional languages to inform non-English speakers that they can either go online or call a toll-free number to have the survey administered online or over the phone in another language.
- Next, ETC will select a random sample of residents to be contacted for the survey. The sample will be address-based and will ensure all households within the study area have an equal opportunity of being selected to participate in the random sample research group.

Engaging + Dynamic Community Conversations

Community conversations are typically the most visible qualitative technique method. In order to ensure that we not waste resident's time but rather make residents feel like they have effectively contributed to the process, we strive to provide a variety of engaging exercises in our public workshops.

Each of our public meetings begins with a brief 5 to 10 minute Power Point Presentation that provide attendees with a brief overview of the project and public workshop process.

Following the presentation, the public workshop transitions into a public open house format where residents have at least five (5) different exercise stations that they can visit to provide input. These typically include the following:

- **Facility Needs and Priorities Matrix** – Attendees are given dots to place on photos of facilities that they feel are most important, but not being adequately provided by the City.
- **Programmatic Needs and Priorities Exercise** - Attendees are given dots to place on photos of programs that they feel are most important, but not being adequately provided by the City.
- **Funding Priority Buckets Exercise** – Buckets are placed on a table, each with a different funding priority. Attendees are given ten coins, each worth \$10 and are asked to distribute the \$100 in the funding priorities that they feel are most important.
- **Open Discussion with the Director(s)** – Flip charts are placed in a corner of the room where the Director(s) and representative of the PP+D Team stand to speak and document whatever topic is on an attendees mind.
- **Improvements to Specific Parks** – Aerial photographs of parks are printed on 24" x 36" plots and placed throughout the room. Residents are asked to provide comments on Posted-Notes of the park improvements they would like to see happen on each of the parks and are asked to place those improvements on the specific location of the park that they would like to see the improvement happen.

We can also complete exercises virtually using platforms such as Zoom, Social Pinpoint, and Mentimeter.

Findings from these qualitative technique methods are then compared with the findings from our secondary and primary quantitative techniques to identify specific patterns. The needs that we see and hear repeatedly throughout the various techniques are typically indicative of the priority needs. Using this transparent, engaging, and dynamic approach has helped us maximize public support for our Client's plans.





Step 2: Administer the Survey:

- Once approved by the LFUCG, ETC will Administer the survey by a combination of mail and online.
- ETC will mail the survey and a cover letter (on LFUCG letterhead) to a random sample of households in the study area. Only one survey per household will be sent. Postage-paid envelopes will be provided by ETC for each respondent.
- PP+D will work the LFUCG to develop the cover letter for the mailed survey. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it on-line.
- ETC will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC's fees including printing and mailing up to 8,000 surveys and 8,000 postcards. The goal will be to obtain completed surveys from 1,000 residents. A sample of 1,000 completed surveys will provide results that have a margin of error of +/-3.1% at the 95% level of confidence citywide. ETC will ensure a statistically valid number of responses is collected from up to six Park Planning Districts to provide a margin of error of +/-8.0% at the 95% level of confidence.
- ETC will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- All respondents who complete the survey online will be required to provide their home address when they finish the survey. ETC will match addresses from respondents who complete the survey online to the addresses that were selected for the random sample to ensure the participant is part of the random sample. If a respondent does not provide an address or the address is not part of the random sample, it will not be included.
- ETC will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the study area with regard to geographic dispersion, age, gender, race/ethnicity and other factors. ETC will weight the data as needed if one or more demographic groups is over/underrepresented relative to recent Census estimates for the LFUCG's population.

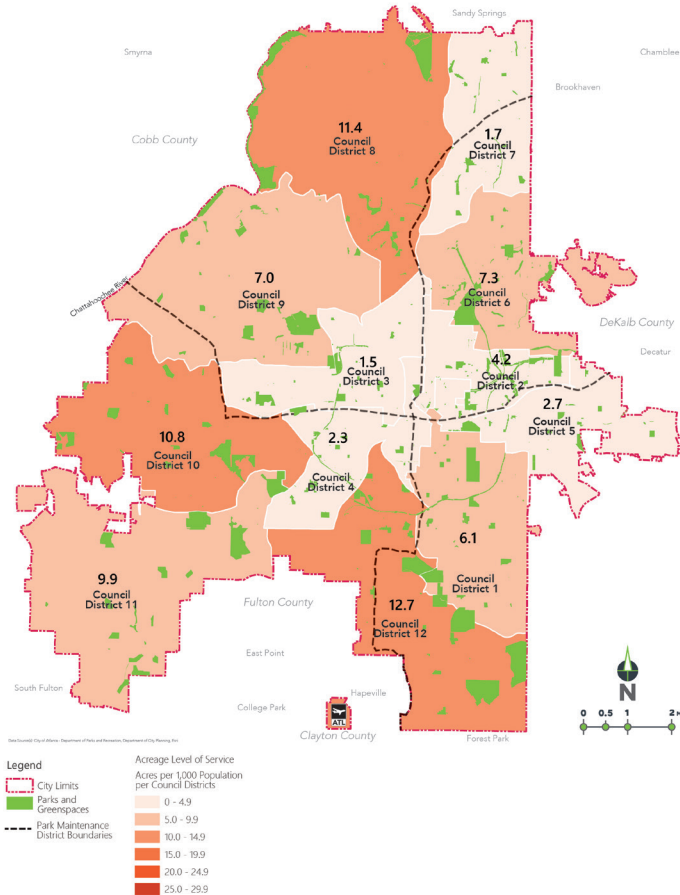
Step 3: Analysis, Final Report, and Interactive Data Dashboard:

- ETC will submit a final report that will include the following items:
 - An executive summary of the survey methodology and a description of major findings.
 - Charts and graphs that show the overall results of each question on the survey, including trends from prior surveys.
 - Benchmarking analysis showing how the LFUCG compares to other communities.
 - Priorities-Investment Rating analysis that will identify the facilities and programs that should receive the highest priority for investment from the LFUCG, citywide and per up to six Park Planning Districts.
 - Cross-tabulations that show the results for key demographic groups, Park Planning Districts, and other variables as desired by the LFUCG.
 - Tabular data that shows the results for each question on the survey, including open ended questions.
 - A copy of the survey instrument
- Additionally, if desired by the LFUCG, ETC will complete an Interactive Data Dashboard as an additional service.

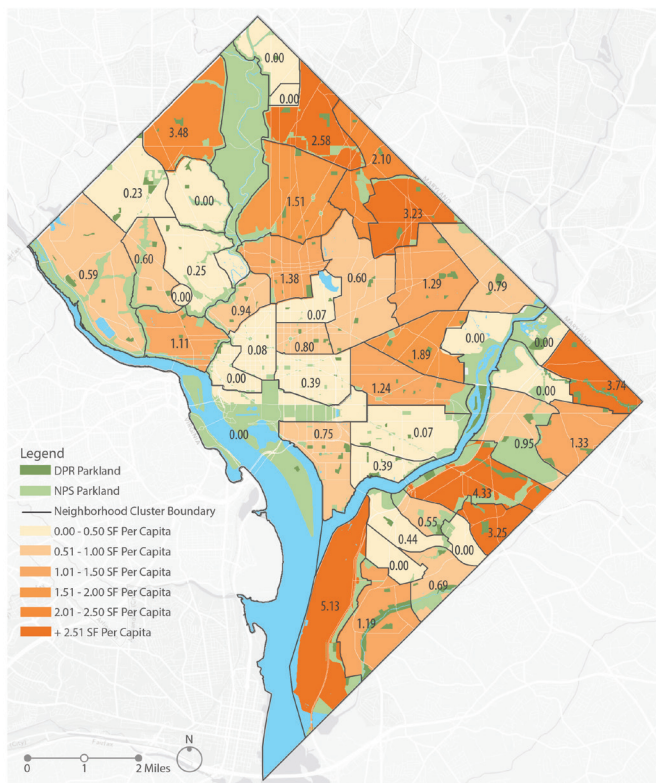
2.8 Online Survey: Once the Statistically Valid Survey is completed, CivicLex will complete an online survey via Survey Monkey or a similar on-line survey platform that the LFUCG is comfortable with to provide an opportunity for residents that did not receive the Statistically Valid Survey, to share their input and therefore expand the reach of public engagement.

This allows us to compare the findings from both survey techniques to identify potential trends and special interest group needs that may not emerge in the unbiased and random Statistically Valid Survey. CivicLex will compile the findings from the online survey into a summary report of findings and provide the City both with the summary as well as the raw survey results.

Atlanta, GA Acreage LOS Analysis per Council District



District of Columbia Indoor Square Footage LOS Analysis per Neighborhood Cluster



2.9 Existing Level of Service Analysis: Unlike other planning disciplines such as transportation, waste water, potable water, etc., there are no standards or guidelines for the Level of Service (LOS) that parks and recreation departments should provide their residents.

In order to assist the LFUCG in developing appropriate LOS standards, PP+D will analyze existing LOS for the following elements to establish a baseline understanding of the LFUCG's current LOS:

- **Acceage LOS** – Aceage in a ratio to the community's population (acres per 1,000) per Park Planning District and city-wide.
- **Indoor Recreation Center and Aquatics Space LOS** – Quantity of square footage of indoor recreation centers and aquatics facilities space per capita citywide and Park Planning District.
- **Facilities/Amenities LOS** – Facility/amenity capacity in a ratio to the community's population and comparing against a standard or guideline. PP+D proposes to conduct Facilities/Amenities LOS for key facilities/ amenities that are benchmarkable.
- **Access LOS** – Travel distances (walk/ drive time) to parks based on park classifications as well as individual facilities such as playgrounds, ball fields, trails, natural areas, etc. per Park Planning District and citywide.

The best Access LOS analysis uses the exiting roadway to determine access, rather than “as the crow flies” radii around facilities. We identify physical barriers, both man-made and natural, to provide a realistic access level service area. These barriers may include roads that while containing sidewalks, may not be safe to cross due to a variety of factors that, through our experience, we have identified to be important in determining a streets’ crossability.

- **Trust for Public Land Parkscore** – The 2025 TPL Parkscore is comprised of 5 elements each making up 20% of the total Parkscore - Acreage, Access, Amenities, Investment, and Equity. PP+D will break-up and analyze the Parkscore. These findings will be useful during the Phase 3 - Vision to inform potential recommendations.
- **Park Visitation LOS** – *Should the LFUCG have access to a location analytics platform that provides insights into physical places through the analysis of anonymized mobile device data, below are various analyses that could be completed as part of a Park Visitation LOS Analysis. If the LFUCG does not have access to such data, PROS Consulting has professional relationships with vendors that could provide the data for a fee.*



- **Visitor Heatmaps** - Visualize visitor activity concentrations within parks, identifying infrastructure needs, circulation patterns, and maintenance hotspots.
- **Service Area Mapping** - Clearly delineate park user origins and define service areas to support equity analyses, targeted outreach, and grant applications.
- **Demographic Visitor Profiles** - Combine visitor data with Census demographics to highlight who parks serve and identify underserved groups.
- **Underserved Area Identification** - Identify service gaps by comparing visitation origins with residential data, guiding equitable park development and targeted programming.
- **System-Wide Visitation Reporting** - Benchmark park usage across an entire system to assess relative performance and prioritize investments.
- **Time-of-Day and Day-of-Week Trends** - Optimize staffing, programming, maintenance, and safety protocols by uncovering detailed temporal visitation patterns.
- **Average Visits per Device** - Track frequency of park visits, distinguishing casual visitors from regular users, guiding management and programming.
- **Local vs. Nonlocal Use** - Differentiate local versus tourism-driven park visitation, informing targeted marketing and community engagement strategies.
- **Quality LOS** – Quality of facilities across the community based on the findings from the Site Evaluations. Scoring is identified per park, per Park Planning District and citywide.
- **Funding LOS** – Parks and recreation operations and maintenance spending, capital spending, and total parks and recreation spending per park and non-park acre per Park Planning District and citywide.
- **Staffing LOS** - Staff in a ratio to the community's population (FTE's per 10,000).

PP+D will then benchmark LOS findings to NRPA Park Metrics and Trust for Public Land Parkscore standards. Additionally, PP+D will work with the City to identify up to five (5) agencies to benchmark - three (3) that are similar to the LFUCG and two (2) that are aspirational. This examination provides the LFUCG with data to use in considering adjustments that align with industry best practices.

PP+D will produce a series of maps and tables that illustrate this data and analysis. Findings will be particularly important for tasks outlined in the Phase 3-Vision and Phase 4-Implementation.

2.10 Needs + Priorities Assessment Summary

Document: PP+D will compile all the information and data completed for Phase 2-Needs and Priorities Assessment and combine the findings with the findings from Phase 1-Context Analyses and develop a summary document.

PP+D will develop a Power Point Presentation and Executive Summary that summarizes the findings from Phase 2 and combines it with the presentation from Phase 1. PP+D will submit the summary document, Executive Summary, and Power Point Presentation to the LFUCG for review and will make revisions per the LFUCG's written comments.

2.11 Findings Presentations: The PP+D Team will present the findings from the Phase 1-Context Analyses and Phase 2-Needs and Priorities Assessment in-person to the following groups:

- The Executive Committee
- Lexington Parks and Recreation Staff
- Parks Advisory Board

PP+D will make revisions per written direction provided by the LFUCG.

2.12 One-on-One Interviews with Elected Officials: The PP+D Team has learned that taking the time to meet one-on-one with the elected officials in specific and key phases of the project, is critical to receiving final Mayor and City Council acceptance and approval of a plan. These one-on-one interviews encourage candid and invaluable input that help garner support for the project.

PP+D will complete virtual one-on-one interviews with the elected officials to share with them the findings from Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment.

2.13 Mayor and City Council Presentation: PP+D has learned that presenting to the Mayor City Council at key points in the process is critical to receiving final approval of the plan. To that end, the PP+D Team proposes to share the findings from the Phase 1-Context Analyses and Phase 2-Needs and Priorities Assessment with Mayor and City Council.

The completion of Phase 2 serves as a break point between the LFUCG's desired Part 1.



Beginning if the LFUCG's Proposed Part 2 Phase 3 – Vision

The LFUCG's desired Part 2 begins with the PP+D Team's Phase 3- Vision Phase.

Phase 3-Vision is unique to our process and was developed based on our extensive parks and recreation master planning experience.

PP+D believes that cities can achieve multiple benefits for residents through a collaboratively parks and recreation visioning process. Local residents, stakeholders, and LFUCG Staff provide invaluable and intimate knowledge of the public realm that enriches the vision for the LFUCG and makes it more relevant, actionable, implementable, and sustainable.

This phase begins with a Visioning Workshop where the group collaboratively develops a customized appropriate response to the identified parks and recreation needs and priorities. The Visioning Workshop provide an additional opportunity for LFUCG staff and/or residents and stakeholders to get involved in the planning process and ensure an actionable and achievable plan that does not sit on the shelf and is aligned with the LFUCG's long-term goals.

Following are the tasks that PP+D proposes to complete for the Visioning Phase.

3.1 Project Management + Coordination: PP+D will continue to coordinate our work with the LFUCG's Project Manager. PP+D will hold regular bi-weekly meetings with LFUCG staff to review progress, present information, and discuss the direction of remaining portions of the project. It is envisioned that one of the bi-weekly meetings will include a meeting with City Administration to provide an update of the process.

3.2 Parks and Recreation System Visioning Workshop: PP+D proposes to complete a two (2) day Visioning Workshop with LFUCG Staff and key stakeholders to develop appropriate responses, goals, and objectives that articulate a clear vision and "road map" and model for the parks and recreation system.

PP+D will work with the LFUCG to develop an agenda for the meeting based on the needs and priorities identified in Phase 2 – Needs and Priorities Assessment. Additionally, PP+D would work with the LFUCG to determine appropriate LFUCG Staff and key stakeholders to invite to the Visioning Workshop. PP+D would develop a meeting summary from the workshop that will inform the Parks and Recreation System Vision Summary Document.

Visioning Workshop Discussions in Miami, Florida





3.3 LFUCG Parks and Recreation System Vision

Summary Document: Based on the findings from Phase 1-Context Analysis, Phase 2 -Needs and Priorities Assessment, and Task 3.1: Visioning Workshop, PP+D will refine and finalize recommendations. The summary document will include, but may not be limited to including:

- **Vision Framework Recommendations**

- If needed, updated agency Mission, Vision, Values (per CAPRA 1.4).
- If needed, updated agency Goals and Objectives that are measurable to demonstrate progress (per CAPRA 1.4).

- **Park Administration Recommendations**

- Policy recommendations.
- Administration and management recommendations.
- Sustainability and environmental resilience recommendations.
- Technology and innovation recommendations.

- **Programs and Services Recommendations**

- Program and service recommendations.
- Event recommendations (large and small) to meet demand, including recommendations on what type and size facilities would meet demand over the next 10-20 years.
- Aquatics programming the public may be interested in over the next 10 years.

- **Maintenance and Operations Recommendations**

- Standards for service delivery recommendations to support special events.
- Innovative technology recommendations currently being used in the parks and recreation industry that could improve the efficiency of park maintenance operations.
- Policy and procedure recommendations for transparent, efficient and responsible community building management performed by community members outside the parks and recreation agency.
- Safety and security of parks and facilities recommendations

- **Planning and Design Recommendations**

- Park classification and standards, including standards for quantity and quality of park/open space.

- Parkland acquisition priorities, including newest Urban Service Boundary Expansion Areas.
- Park planning and design innovation and improved sustainability recommendations.
- Incorporation of TPL Park Equity Accelerator findings.

- **Park and Recreation Facility Recommendations**

- Park recommendations for capital Management (inspection schedule; capital repair schedule based on expected life, etc.)
- Indoor athletic and recreation facility recommendations to meet demand, including recommendations on what type and size facilities would meet demand over the next 10-20 years.
- Aquatic facility recommendations to meet demand, including recommendations on what location and type.
- Golf facility recommendations for capital improvements and additional opportunities for sustainability/ climate resilience.

PP+D will submit the summary document to the LFUCG for review and will make revisions per the LFUCG's written comments.

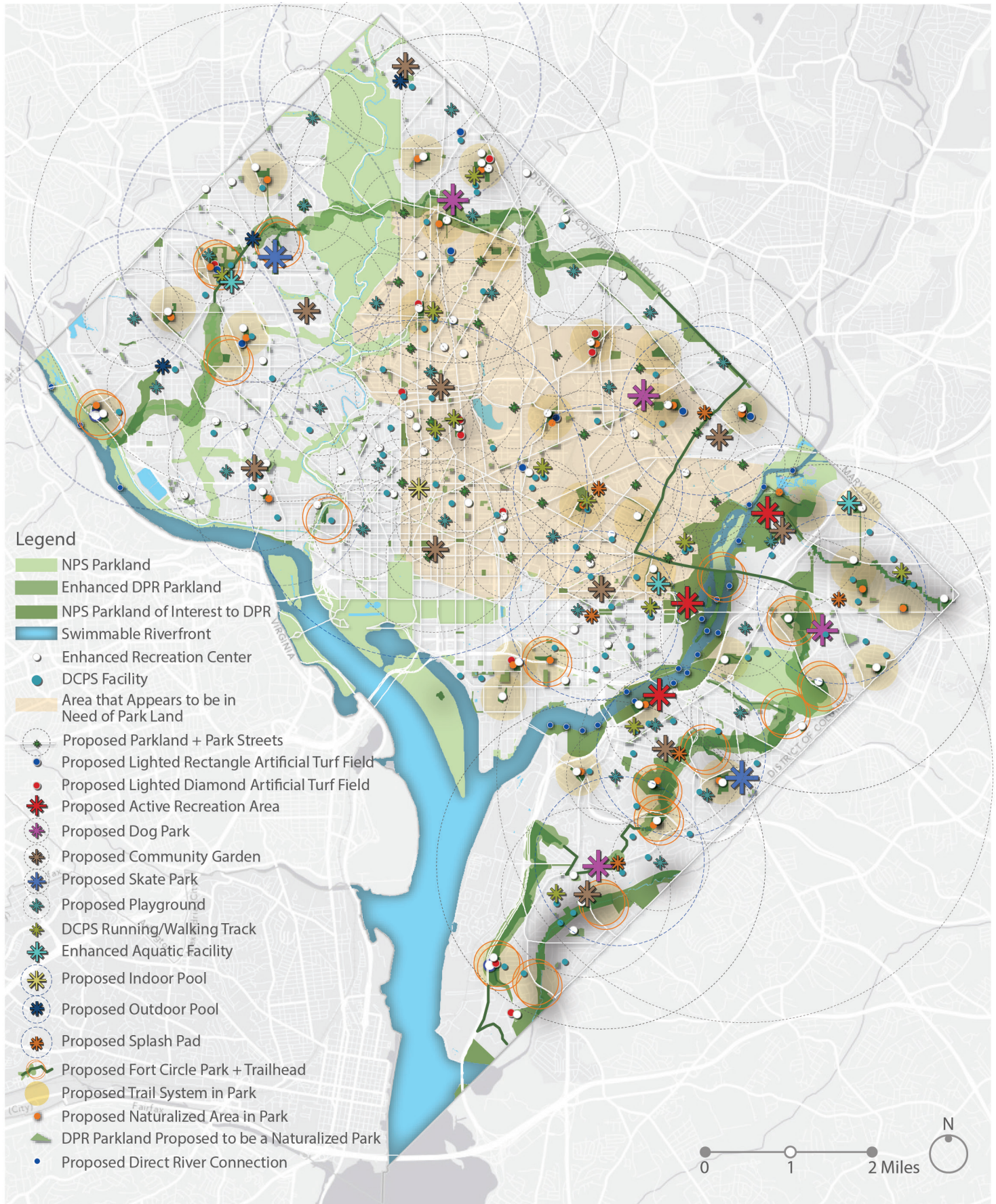
3.4 Updated Interactive Project Website: For Phase 3-Vision, we envision the interactive website being updated to collect input about recommendations. The exercise used will allow users to comment on and discuss recommendations, ask questions, and engage with each other. Users can reply to specific comments and create a threaded discussion that can be followed and tracked over time.

CivicLex would analyze the findings and integrate the findings into a Vision Community Input Summary Report.

3.5 Vision Community Conversations: CivicLex will host follow up listening sessions in the same set of Park Planning District locations. These follow up sessions will summarize what we heard from the needs assessment phase, followed by a structured participatory activity on the draft recommendations. These activities may include, but may not be limited to structured deliberations on master planning recommendations, park improvement recommendations, mapping exercises, or other collaborative elements of the plan. This will be an essential part of the public engagement process and of a larger effort to build relationships around parks



District of Columbia Parks and Recreation System Master Plan Integrated Vision





in Lexington, and an empowering opportunity for residents to shape the plan.

CivicLex would analyze the findings and integrate the findings into a Vision Community Input Summary Report.

3.6 Vision Stakeholder Meetings: CivicLex will also follow up on stakeholder focus groups with a comparable participatory activity to the community listening sessions. This will re-engage the same interest groups and stakeholders in the actual shaping of the plan, increasing accessibility and representation while building relationships and future buy-in. The focus groups will provide an even more targeted, in depth opportunity to have meaningful conversations around the recommendations.

CivicLex would analyze the findings and integrate the findings into a Vision Community Input Summary Report. This report will be submitted to the LFUCG for review. The PP+D Team will then make revisions to the Vision Summary Document per the LFUCG's direction.

3.7 Vision Presentations: The PP+D Team will present the findings from the Vision in-person to the following groups:

- The Executive Committee
- Lexington Parks and Recreation Staff
- Parks Advisory Board

3.8 One-on-One Interviews with Elected Officials: The PP+D Team will complete virtual one-on-one interviews with the elected officials to share the Vision. PP+D will submit the findings from the one-on-one interviews with the elected officials to the City for review and will make revisions per the LFUCG's direction.

3.9 Mayor and City Council Presentation: The PP+D Team proposes to share the Vision with Mayor and City Council.

Phase 4 – Implementation Strategy

Critical to realizing a vision is establishing a thoughtful and phased implementation strategy. Different from the vision, the implementation strategy will take elements from the vision and based on the findings from the needs assessment, suggest a phased, multi-year approach to implementing the vision. Following are the tasks that PP+D proposes to complete for the Implementation Phase.

4.1 Order of Magnitude Capital and Operations Opinion of Probable Cost:

EHI and PP+D will prepare an order of magnitude, planning level opinion of probable cost for parks and recreation recommendations. Costs will include planning level capital and operations costs. PP+D will submit the opinion of probable costs to the LFUCG for review and will revise per the LFUCG's written comments. In consideration of fluctuating grants and operating budgets which may influence the capital planning amounts and duration of the CIP, the spreadsheet will estimate short-term priorities through five (5) years and long-term priorities as six (6) to ten (10) years.

4.2 Funding Options: PP+D will coordinate with the LFUCG Finance to determine realistic future funding opportunities and amounts. Additionally, RMPK Funding will identify a variety of different alternative funding sources, programs, and strategies that have been used by park systems in Kentucky and across the U.S. to leverage and stretch the LFUCG's available funding.

4.2 Prioritization Strategy and Project Scoring: PP+D will work with the LFUCG to develop a CIP Prioritization Strategy that aligns with the findings from Phase-1 Context Analysis, Phase 2-Needs + Priorities Assessment, and Phase 3-Vision.

It is envisioned that this prioritization strategy will include criteria and metrics to score proposed projects. PP+D will score the projects and share a draft list of the projects with the LFUCG for review and will make revisions per the LFUCG's written comments.



Parks and Recreation System Master Plan Implementation Imagery



Existing

Integration of Parks + Gray Infrastructure Systems



Proposed

Leveraging Trails to Provide Parks and Recreation Experiences



Existing



Phase 1



Phase 2



4.3 Implementation Strategies Summary Document:

Based on findings from Phase 1-Context Analysis, Phase 2 - Needs + Priorities Assessment, Phase 3-Vision, Task 4.1: Funding Options, and Task 4.2: Prioritization Strategy and Project Scoring, PP+D will develop an implementation strategy that includes strategies, priorities, budget support, and funding mechanisms for the short-term, mid-term, and long-term. The Implementation Strategy will be organized around the following topics:

- Funding Options
- Prioritization Strategy and Prioritized CIP Projects
- Staff Actions

The Implementation Strategy will be phased with prioritized recommendations a Level-of-Service/reoccurring capital need. PP+D will submit the summary document to the City for review and will make revisions per the LFUCG's written comments.

4.4 Strategic Plan: CAPRA Standard 1.2 requires that the agency complete a strategic plan that is approved by the appropriate authority within the last five years.

Considering that the Parks and Recreation Master Plan may update the mission and vision of the Department and establish new goals and objectives for the Department, there is an opportunity to use the Parks and Recreation Master Planning process to complete the Strategic Plan for the Department and have it approved alongside the Parks and Recreation Master Plan. PP+D recently achieved this for the City of Atlanta, Georgia and City of Boynton Beach, Florida. To complete the Strategic Plan, PP+D would complete the following tasks:

- Work collaboratively with the LFUCG to identify which Goals, Objectives, Actions, Steps and KPIs from the Parks and Recreation Master Plan should be advanced over the next 5-years.
- Add any Action and Steps that may be deemed appropriate.
- Develop a graphically compelling Strategic Plan based on the Parks and Recreation Master Plan format.

PP+D would then submit the Strategic Plan to the LFUCG for review and make revision comments based on written comments provided by the LFUCG.

Phase 5 – Final Report and Approval

Phase 5 gathers all the information developed during the project and compiles it into one holistic and comprehensive document. Following are the tasks that the PP+D Team proposes to complete for the Final Report and Approval phase.

5.1 Draft Final Report, Executive Summary, and Power Point Presentation: PP+D will compile the summary documents from Phases 1 through 4 into a draft final document for the LFUCG to review. PP+D will complete a standalone Executive Summary and PowerPoint Presentation that summarizes key findings from the plan.

PP+D will submit the draft report, Executive Summary, and PowerPoint presentation to the LFUCG for review make revisions per the LFUCG's written comments.

5.2 Draft Final Master Plan Presentation: The PP+D Team will present the Draft Final Master Plan in-person to the following groups:

- The Executive Committee
- Lexington Parks and Recreation Staff
- Parks Advisory Board

5.3 One-on-One Interviews with Elected Officials: The PP+D Team will complete virtual one-on-one interviews with the elected officials to share the Vision. PP+D will submit the findings from the one-on-one interviews with the elected officials to the City for review and will make revisions per the LFUCG's direction.

5.4 Mayor and City Council Draft Final Presentation: The PP+D Team will present the Draft Final Master Plan to Mayor and City Council for Approval.

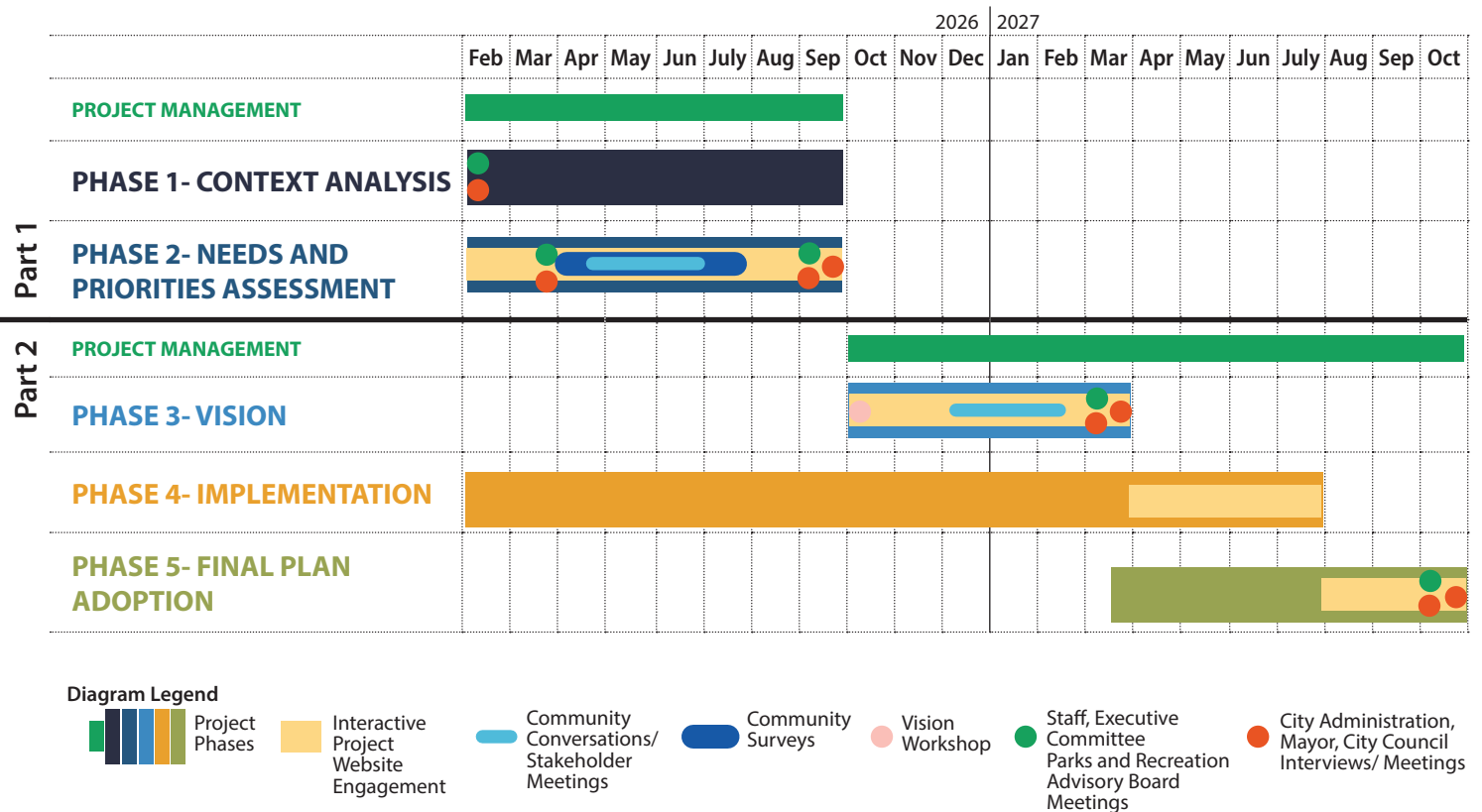


5 Schedule

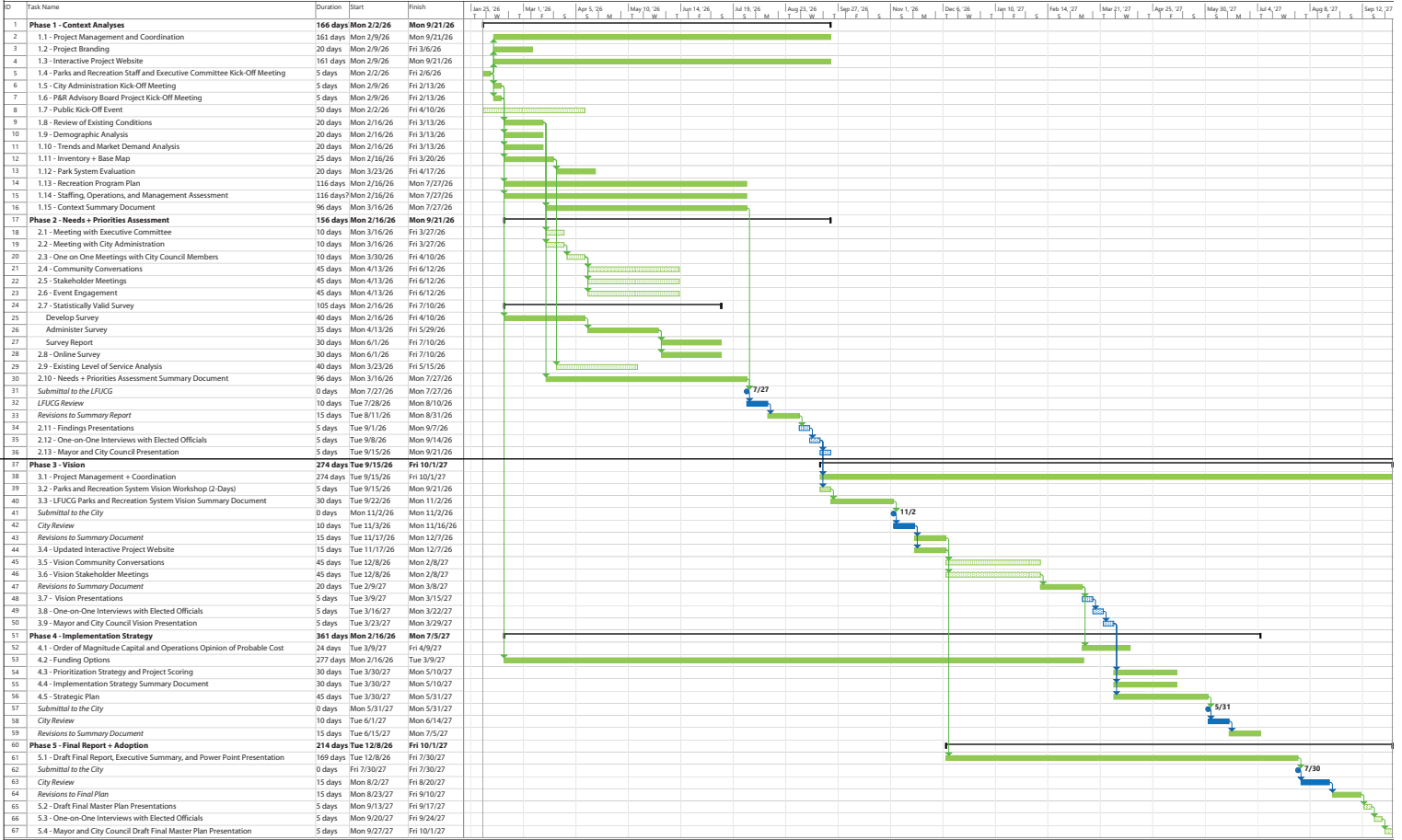
The Perez Planning + Design (PP+D) Team understands that the Lexington-Fayette Urban County Government (LFUCG) desires Part 1 of the Parks and Recreation Master Plan to begin February 2026 and be completed by Fall of 2026. Part 2 should commence between February 2026 and Summer 2026 as soon as funding is received and end no later than January 2028.

Based on PP+D's experiencing in completing projects comparable to the LFUCG Parks and Recreation Master Plan, we believe this schedule provides sufficient time to complete the project.

In an effort to keep projects on schedule, we have found that pre-scheduling project milestone dates such as deliverable submittal dates, LFUCG review periods, public engagements, presentations, etc., is key to the project remaining on schedule. Below is simplified preliminary draft project schedule for the City's considerations. A detailed preliminary draft project schedule is included in the following page. We are happy to revise this schedule per the LFUCG's desire.



Lexington Fayette Urban County Government Parks and Recreation Master Plan
PRELIMINARY DETAILED DRAFT Project Schedule | October 2025



Part 1
Part 2

6 Deliverables

The Perez Planning + Design (PP+D) Team is committed to providing data and documents throughout the planning process to support the Parks and Recreation Master Plan's progress and ensure that appropriate reporting and documentation is available to the Lexington-Fayette Urban County Government (LFUCG) and the public for review and comment. Below is a list of deliverables per phase followed by examples of completed deliverables.

LFUCG Part 1 Deliverables

Phase 1- Context Analysis Deliverables:

- Draft and Final Phase 1- Context Analysis Summary Document + Power Point Presentation
 - * Summary of Community Analysis Methodology
 - * Community Analysis Findings
 - * Inventory and Condition of Existing Park and Recreation Facilities
- Appendix with all data collected

Phase 2- Needs and Priorities Assessment Deliverables:

- Phase 1 Context Analysis and Phase 2- Needs and Priorities Assessment Executive Summary (also formatted for website)
- Draft and Final Phase 2- Needs and Priorities Assessment Summary Document + Power Point Presentation
 - * Summary of Stakeholder Engagement Methodology
 - * Stakeholder Engagement Findings
 - * Needs Assessment / Identifying Service Gaps and Access Needs
- Appendix with all data collected

Provided for All Phase Deliverables:

- All spreadsheets in separate, Excel files, graphic files in high resolution format for any logos created to represent the project.
- All GIS shapefiles created to produce maps
- All requested photographs specifically collected as part of the project (JPEG Format)
- Documents formatted for printing as directed by the LFUCG

LFUCG Part 2 Deliverables

Phase 3 Deliverables:

- Draft and Final Phase 3- Vision Summary Document + Power Point Presentation
 - * Summary of Stakeholder Engagement Methodology
 - * Stakeholder Engagement Findings
 - * Policy Overview and Recommendations for new/ revised policies
 - * Administration and Management recommendations
 - * Sustainability and Environmental resilience recommendations
 - * Technology and Innovation recommendations
 - * Programs and Services recommendations
 - * Park Classification & Standards
 - * Maintenance and Operations recommendation
 - * Park Classification & Standards
 - * Park and Recreation Facility recommendations
 - * Parkland Acquisition and Development recommendations
- Appendix with all data collected

Phase 4 Deliverables:

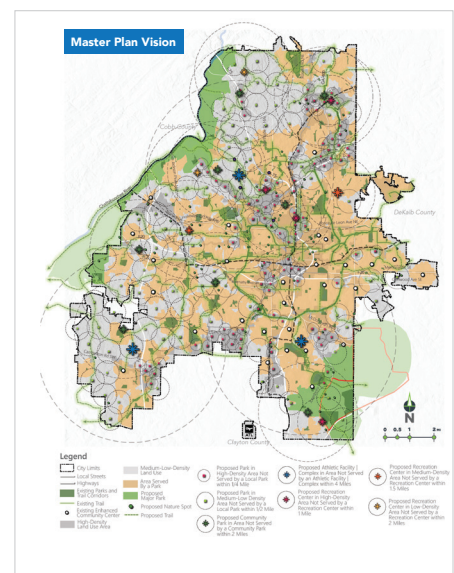
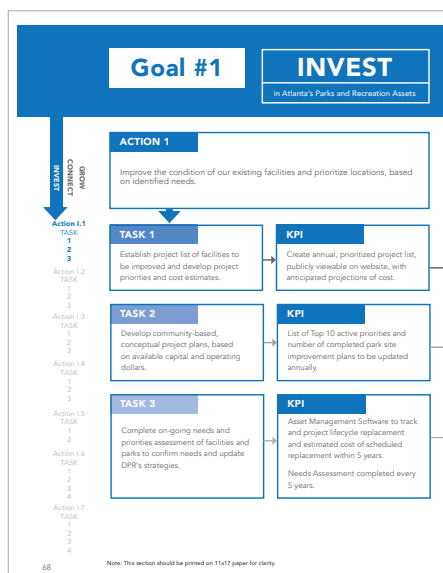
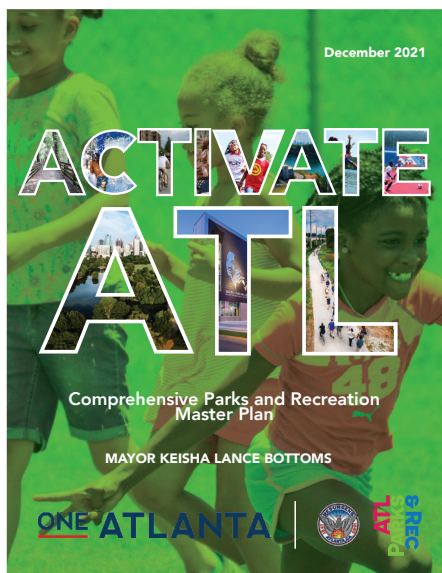
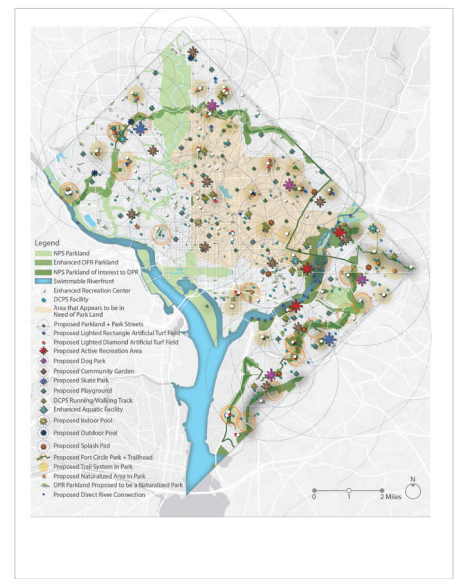
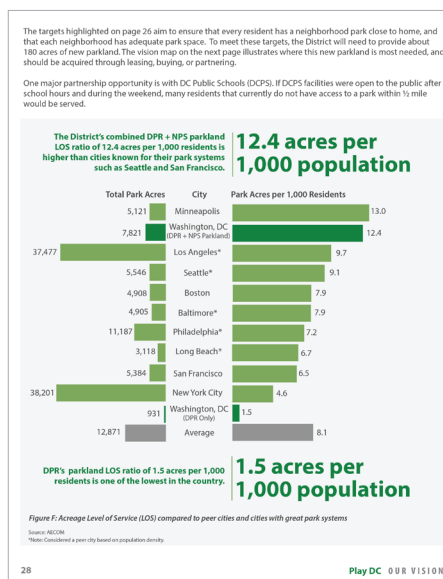
- Draft and Final Phase 4- Implementation Summary Document + Power Point Presentation
 - * Park Fund Leverage Strategies and Balanced Investment recommendations
 - * Prioritization Strategy Methodology and Prioritized Project List with Planning Level, Opinion of Probable Capital and Operation Costs
 - * Staff Action Plan
 - * Strategic Plan
- Appendix with all data collected

Phase 5 Deliverables:

- Draft and Final Parks and Recreation Master Plan Report + Power Point Presentation
- Draft and Final Executive Summary of Parks and Recreation Master Plan
- Appendix with all data collected

Examples of Deliverables

Below are examples of report and executive summary covers and pages that PP+D Staff have completed for various Parks and Recreation System Master Plan Reports. We strive to develop reports that are highly graphical, easy to read, and inspiring.





7 Assumptions and Constraints

Following are assumptions that the Perez Planning + Design (PP+D) Team considered during the development of the Lexington-Fayette Urban County Government (LFUCG) Parks and Recreation Master Plan Scope and Fee:

- It is assumed that the LFUCG would coordinate meetings with the Executive Committee, City Administration, and one-on-one meetings Mayor and City Council Members informed by the availability of the PP+D Team.
- It is assumed that the LFUCG would lead the promotion of the LFUCG Parks and Recreation Master Plan process including community conversations, event engagements, and online surveys.



8 Pricing Matrix

Below is the Perez Planning + Design (PP+D) Team's Lump Sum price for the Lexington-Fayette Urban County Government's (LFUCG) Part 1 along with a separate Additive Alternative Lump Sum of Part 2 of this work. The following page contains our Team's hourly rates. We look forward to the opportunity to discuss our fees with the LFUCG in more detail and revise them per the LFUCG's direction.

Consultant Services	Lump Sum Fee
1a. Parks and Recreation Master Plan Part I - Community Analysis	\$ 218,500
1b. Parks and Recreation Master Plan Part I - Stakeholder Engagement	\$ 158,500
1c. Parks and Recreation Master Plan Part I – Presentation and Final Deliverables	\$ 65,500
Part I Base Bid Subtotal	\$ 442,500
2a. Parks and Recreation Master Plan Part II – 25% Scope Complete	\$ 91,875
2b. Parks and Recreation Master Plan Part II – 50% Scope complete	\$ 91,875
2c. Parks and Recreation Master Plan Part II – 75% Scope complete	\$ 91,875
2d. Parks and Recreation Master Plan Part II – 100% Scope complete	\$ 91,875
Additive Alternate Part II Subtotal	\$ 367,500
Phase I Base Bid and Additive Alternate Part II Total	\$ 810,000

Additional Services:

Task 1.7. Public Kick-off Event:

\$18,300

Task 2.9. Existing Level of Service Analysis - Park Visitation LOS:

\$13,500 for up to/ everyone 10 parks.



Hourly Rates

PEREZ PLANNING + DESIGN

Carlos Perez - Project Manager	\$135
Kevan Klosterwill - Associate Planner	\$115
Nick Stephens - Planner	\$110
Yan Duan - Urban Designer	\$105
Administrative Assistant	\$ 50

PROS CONSULTING

Brian Trusty - Principal	\$200
Jayne Miller - Principal	\$200
Leon Younger - Principal	\$230
Travis Tranbarger - Senior Project Manager	\$155

LORD AECK SARGENT

Stanford Harvey - Principal	\$230
Jordan Sebastian - Senior Associate	\$185
Kevin Kinney - Landscape Designer	\$120

CIVICLEX

Richard Young - Executive Director	\$200
Kit Anderson - Deputy Director	\$165
Haley Wartell - Communications Specialist	\$135
Lilly Bramley - Project Specialist	\$125

ETC INSTITUTE

Jason Morado - Director of Community Research	\$221.71
Ryan Murray - Assistant Director of Community Research	\$169.23
Researcher	\$ 80.29
Support Staff	\$ 67.85

EHI CONSULTANTS

Edward Holmes - Principal	\$250
Ryan Holmes - Project Manager	\$200
Professional Engineer	\$175
Senior Planner	\$115
Planner	\$110

NATIONAL GOLF FOUNDATION

Richard B. Singer - Senior Director of Consulting Services	\$200
Edward Getherall - Senior Associate Consultant	\$175
Bill Golden - Associate Consultant	\$175
Jodi Reilly - Consulting/ Research Administrator	\$ 75

KEVIN H. HARGRAVE, GOLF COURSE ARCHITECT

Kevin Hargrave - Principal	\$300
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COUNSILMAN-HUNSAKER

George Deines - Principal	\$285
Director	\$250
Project Manager	\$220
Project Engineer/Architect	\$185.00
Design Associate	\$155
Administrative	\$90

RMPK FUNDING

Ryan Ruskay - Principal	\$200
Planner	\$150



9 Forms

AFFIDAVIT

Comes the Affiant, Carlos F. Perez, and after being first duly sworn, states under penalty of perjury as follows:

1. His/her name is Carlos F. Perez and he/she is the individual submitting the proposal or is the authorized representative of Perez Planning + Design, LLC, the entity submitting the proposal (hereinafter referred to as "Proposer").
2. Proposer will pay all taxes and fees, which are owed to the Lexington-Fayette Urban County Government at the time the proposal is submitted, prior to award of the contract and will maintain a "current" status in regard to those taxes and fees during the life of the contract.
3. Proposer will obtain a Lexington-Fayette Urban County Government business license, if applicable, prior to award of the contract.
4. Proposer has authorized the Division of Central Purchasing to verify the above-mentioned information with the Division of Revenue and to disclose to the Urban County Council that taxes and/or fees are delinquent or that a business license has not been obtained.
5. Proposer has not knowingly violated any provision of the campaign finance laws of the Commonwealth of Kentucky within the past five (5) years and the award of a contract to the Proposer will not violate any provision of the campaign finance laws of the Commonwealth.
6. Proposer has not knowingly violated any provision of Chapter 25 of the Lexington-Fayette Urban County Government Code of Ordinances, known as "Ethics Act."

Continued on next page



7. Proposer acknowledges that "knowingly" for purposes of this Affidavit means, with respect to conduct or to circumstances described by a statute or ordinance defining an offense, that a person is aware or should have been aware that his conduct is of that nature or that the circumstance exists.

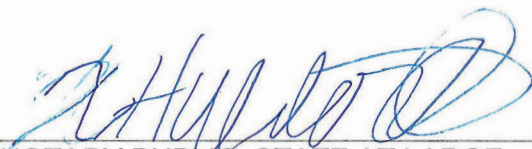
Further, Affiant sayeth naught.

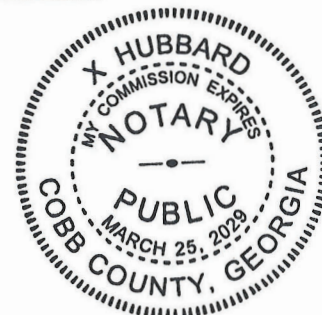
STATE OF Georgia

COUNTY OF Fulton

The foregoing instrument was subscribed, sworn to and acknowledged before me
by  on this the 2nd day
of October, 2025.

My Commission expires: 3-25-2029


NOTARY PUBLIC, STATE AT LARGE





EQUAL OPPORTUNITY AGREEMENT

Standard Title VI Assurance

The Lexington Fayette-Urban County Government, (hereinafter referred to as the "Recipient") hereby agrees that as a condition to receiving any Federal financial assistance from the U.S. Department of Transportation, it will comply with Title VI of the Civil Rights Act of 1964, 78Stat.252, 42 U.S.C. 2000d-4 (hereinafter referred to as the "Act"), and all requirements imposed by or pursuant to Title 49, Code of Federal Regulations, U.S. Department of Transportation, Subtitle A, Office of the Secretary, (49 CFR, Part 21) Nondiscrimination in Federally Assisted Program of the Department of Transportation – Effectuation of Title VI of the Civil Rights Act of 1964 (hereinafter referred to as the "Regulations") and other pertinent directives, no person in the United States shall, on the grounds of race, color, national origin, sex, age (over 40), religion, sexual orientation, gender identity, veteran status, or disability be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Recipient receives Federal financial assistance from the U.S. Department of Transportation, including the Federal Highway Administration, and hereby gives assurance that will promptly take any necessary measures to effectuate this agreement. This assurance is required by subsection 21.7(a) (1) of the Regulations.

The Law

- Title VII of the Civil Rights Act of 1964 (amended 1972) states that it is unlawful for an employer to discriminate in employment because of race, color, religion, sex, age (40-70 years) or national origin.
- Executive Order No. 11246 on Nondiscrimination under Federal contract prohibits employment discrimination by contractor and sub-contractor doing business with the Federal Government or recipients of Federal funds. This order was later amended by Executive Order No. 11375 to prohibit discrimination on the basis of sex.
- Section 503 of the Rehabilitation Act of 1973 states:

The Contractor will not discriminate against any employee or applicant for employment because of physical or mental handicap.

- Section 2012 of the Vietnam Era Veterans Readjustment Act of 1973 requires Affirmative Action on behalf of disabled veterans and veterans of the Vietnam Era by contractors having Federal contracts.
- Section 206(A) of Executive Order 12086, Consolidation of Contract Compliance Functions for Equal Employment Opportunity, states:

The Secretary of Labor may investigate the employment practices of any Government contractor or sub-contractor to determine whether or not the contractual provisions specified in Section 202 of this order have been violated.

The Lexington-Fayette Urban County Government practices Equal Opportunity in recruiting, hiring and promoting. It is the Government's intent to affirmatively provide employment opportunities for those individuals who have previously not been allowed to enter into the mainstream of society. Because of its importance to the local Government, this policy carries the full endorsement of the Mayor, Commissioners, Directors and all supervisory personnel. In following this commitment to Equal Employment Opportunity and because the Government is the benefactor of the Federal funds, it is both against the Urban County Government policy and illegal for the Government to let contracts to companies which knowingly or unknowingly practice discrimination



in their employment practices. Violation of the above mentioned ordinances may cause a contract to be canceled and the contractors may be declared ineligible for future consideration.

Please sign this statement in the appropriate space acknowledging that you have read and understand the provisions contained herein. Return this document as part of your application packet.

Bidders

I/We agree to comply with the Civil Rights Laws listed above that govern employment rights of minorities, women, Vietnam veterans, handicapped and aged persons.

Carlos Perez, President

Signature

Perez + Planning Design, LLC

Name of Business



WORKFORCE ANALYSIS FORM

Name of Organization: _____

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African- American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals	5	2	1	1							1					3	2
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical	2				2												2
Skilled Craft																	
Service/Maintenance																	
Total:	7	2	1	1	2						1					3	4

Prepared by: Carlos Perez, President Date: 10 / 7 / 25

(Name and Title)

Revised 2015-Dec-15



EQUAL OPPORTUNITY AGREEMENT

Standard Title VI Assurance

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Bidders

I/We agree to comply with the Civil Rights Laws listed above that govern employment rights of minorities, women, Vietnam veterans, handicapped and aged persons.

Leon Younger

Signature

PROS Consulting, Inc.

Name of Business

**WORKFORCE ANALYSIS FORM**Name of Organization: PROS Consulting, Inc.

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African- American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators		1	1														
Professionals		7	3		1												
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical																	
Skilled Craft																	
Service/Maintenance																	
Total:		8	4	1													

Prepared by: Leon Younger, President Date: 10 / 7 / 2025

(Name and Title)

Revised 2015-Dec-15



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Signature

Lord Aeck Sargent Planning & Design, Inc
Name of Business



WORKFORCE ANALYSIS FORM

Name of Organization: Lord Aeck Sargent Planning & Design, Inc.

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African- American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals		54	52	3	3	2	4			3	5					62	64
Superintendents																	0
Supervisors																	0
Foremen																	0
Technicians																	0
Protective																	0
Para-																	0
Office/Clerical		3	14	1	1	1	5				1					5	21
Skilled Craft																	0
Service/Maintena																	0
Total:																67	85

Prepared by: Victoria Cunningham, Director of Business Operations Date: 10/7/25



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Signature

National Golf Foundation Consulting, Inc.
Name of Business

**WORKFORCE ANALYSIS FORM**Name of Organization: National Golf Foundation Consulting, Inc.

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African- American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals		2	1														
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical			2														
Skilled Craft																	
Service/Maintenance																	
Total:		2	3													2	3

Prepared by: Richard Singer, Sr. Director of Consulting Services Date: 10 / 7 / 2025

(Name and Title)

Revised 2015-Dec-15



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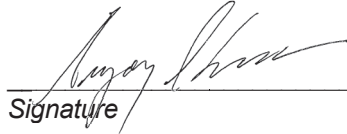


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Signature

ETC Institute
Name of Business



WORKFORCE ANALYSIS FORM

Name of Organization: ETC Institute

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		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators	9	7		1		1											
Professionals	12	5	4	1			1			1							
Superintendents																	
Supervisors	8	5	2							1							
Foremen																	
Technicians	15	3	7		1		1			1	1			1			
Protective Service																	
Para-Professionals																	
Office/Clerical	6	2	4														
Skilled Craft																	
Service/Maintenance	2					2											
Total:	52																

Prepared by: Ryan Murray, Assistant Director of Community Research
(Name and Title)

Date: 10/07/2025
Revised 2015-Dec-15



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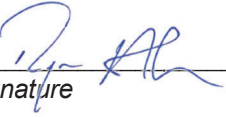


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Signature

EHI Consultants
Name of Business

**WORKFORCE ANALYSIS FORM**Name of Organization: EHI Consultants

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		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators			2														2
Professionals		2	1			4										6	1
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical																	
Skilled Craft																	
Service/Maintenance																	
Total:																	

Prepared by: Ryan HolmesDate: 10 / 7 / 2025

(Name and Title)

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CivicLex

Name of Business



WORKFORCE ANALYSIS FORM

Name of Organization: CivicLex

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		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals		1	4											1	1	5	
Superintendents																	
Supervisors		1	1													1	1
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical																	
Skilled Craft																	
Service/Maintenance																	
Total:		2	5											1	2	6	

Prepared by: Kit Anderson, Deputy Director Date: 10 / 8 / 25

(Name and Title)

Revised 2015-Dec-15



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Ryan Ruskay

Signature

RMPK Funding

Name of Business



WORKFORCE ANALYSIS FORM

Name of Organization: RMPK Funding

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Administrators			1														1
Professionals	3	1	1														2
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical																	
Skilled Craft																	
Service/Maintenance																	
Total:	3	1	2														3

Prepared by: Ryan Ruskay, President Date: 10 / 7 / 25

(Name and Title)

Revised 2015-Dec-15



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Firm Submitting Proposal: Perez Planning + Design, LLC

Complete Address: 878 Peachtree Street NE, Suite 827 Atlanta GA 30309
Street City Zip

Contact Name: Carlos Perez Title: President

Telephone Number: 404.416.0114 Fax Number: 404.393.2029

Email address: cperez@perezpd.com



LEXINGTON

LFUCG MWDBE PARTICIPATION FORM

Bid/RFP/Quote Reference # 32-2025

The MWDBE and/or veteran subcontractors listed have agreed to participate on this Bid/RFP/Quote. If any substitution is made or the total value of the work is changed prior to or after the job is in progress, it is understood that those substitutions must be submitted to the Division of Procurement for approval immediately. **Failure to submit a completed form may cause rejection of the bid.**

MWBE Company, Name, Address, Phone, Email	DBE/MBE WBE/VOSB/SDVOSB	Work to be Performed	Total Dollar Value of the Work	% Value of Total Contract
1. EHI Consultants 333 West Vine Street, Suite 300 Lexington, KY (859) 495-4881 eholmes@ ehiconsultants.com	DBE/ MBE	Planning Public Engagement Cost Estimating	\$65,600	8%
2.				
3.				
4.				

The undersigned company representative submits the above list of MDWBE and veteran firms to be used in accomplishing the work contained in this Bid/RFP/Quote. Any misrepresentation may result in the termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and false claims.

Perez Planning + Design, LLC

Company

10/7/25

Date

Carlos Perez

Company Representative

President

Title



ATTACHMENT A – SMALL AND DISADVANTAGED, MINORITY-, WOMEN-, AND VETERAN-OWNED BUSINESS OUTREACH PLAN

Proposer Name:	Perez Planning + Design, LLC	Date:	10/7/2025
Project Name:	LFUCG Parks and Recreation Master Plan	Project Number:	RFP#32-2025
Contact Name:	Carlos F. Perez	Telephone:	(404) 416-0114
Email:	cperez@perezpd.com		

The mission of the Minority Business Enterprise Program is to facilitate the full participation of disadvantaged businesses, minority-, women-, veteran-, and service-disabled veteran-owned businesses in the procurement process and to promote economic inclusion as a business imperative essential to the long-term economic viability of Lexington-Fayette Urban County Government.

To that end, small and disadvantaged businesses, including minority-, woman-, veteran-, and service-disabled veteran-owned businesses, must have an equal opportunity to be utilized in the performance of contracts with public funds spent from certain discretionary agreements. By submitting its offer, Bidder/Proposer certifies that it has taken, and if there are further opportunities will take, reasonable steps to ensure that small and disadvantaged businesses, including minority-, woman-, veteran-, and service-disabled veteran-owned businesses, are provided an equal opportunity to compete for and participate in the performance of any subcontracts resulting from this procurement.

The information submitted in response to this clause will not be considered in any scored evaluation. Failure to submit this form may cause the bid or proposal to be rejected.

Is the Bidder/ Proposer a certified firm? Yes ☐ No ☒

If yes, indicate all certification type(s):

DBE ☐

MBE ☐

WBE ☐

SBE ☐

VOSB/SDVOSB ☐

and supply a copy of the certificate and/or certification letter if not currently listed on the city's Minority Business Enterprise Program's (MBEP) certified list.

1. Include a list of firms that Bidder/ Proposer has had a contractual relationship with within the last two years that are minority-owned, woman-owned, veteran-owned or small businesses, regardless of their certification status.

The Bidder/ Proposer is a Certified Minority Business Enterprise (MBE) and Small Business Enterprise (SBE) in the State of Georgia and in the City of Atlanta, Georgia. The Bidder/ Proposer currently does not have any contractual relationships with Kentucky minority-owned, woman-owned, veteran-owned, or small business during the last two years.

2. Does Bidder/Proposer foresee any subcontracting opportunities for this procurement?

Yes ☒ No ☐



If no, please explain why in the field below. Do not complete the rest of this form and submit this first page with your bid and/or proposal. [\(Click or tap here to enter text.\)](#)

If yes, please complete the following pages and submit all pages with your bid and/or proposal.

Describe the steps Bidder/Proposer took to solicit small and disadvantaged businesses, including MBEs, WBEs, VOSBs, and SDVOSBs, for subcontracting opportunities for this procurement.

3. Check the good faith and outreach efforts the Bidder/Proposer used to encourage the participation of small and disadvantaged businesses including, MBEs, WBEs, VOSBs and SDVOSBs:

- ☐ Bidder placed advertisements in search of prospective small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs for the solicitation.
- ☐ Bidder attended LFUCG Procurement Economic Inclusion Outreach event(s) within the past year.
- ☐ Bidder attended pre-bid and/or pre-proposal meetings for this solicitation.
- ☐ Bidder sponsored an Economic Inclusion Outreach event.
- ☒ Bidder requested a list of certified small, DBE, MBE, WBE, VOSB and/or SDVOSB subcontractors or suppliers from LFUCG.
- ☒ Bidder contacted organizations that work with small, DBE, MBE, WBE, VOSB and/or SDVOSB companies.
- ☒ Bidder sent written notices to certified small, DBE, MBE, WBE, VOSB and SDVOSB businesses.
- ☒ Bidder followed up to initial solicitations with interested small, DBE, MBE, WBE, VOSB and/or SDVOSB.
- ☒ Bidder provided small, DBE, MBE, WBE, VOSB and/or SDVOSB businesses interested in performing the solicited work with prompt access to the plans, specifications, scope of work, and requirements of the solicitation.
- ☒ Bidder made efforts to segment portions of the work to be performed by small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs, including dividing sub-bid/partnership opportunities into economically feasible units/parcels, to facilitate participation.



- ☒ Bidder negotiated in good faith with interested small, DBE, MBE, WBE, VOSB and/or SDVOSB businesses.
- ☐ Bidder provided adequate rationale for rejecting any small business', DBEs, MBEs, WBEs, VOSBs or SDVOSBs for lack of qualifications.
- ☐ Bidder offered assistance in obtaining bonding, insurance, financial, equipment, or other resources to small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs, in an effort to assist them in meeting project requirements.
- ☐ Bidder made efforts to expand the search for small businesses, DBEs MBEs, WBEs, VOSBs and/or SDVOSBs beyond the usual geographic boundaries.
- ☐ Bidder made other reasonable efforts to include small businesses, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs participation.

4. Bidder/Proposer must include documentation, including the date each effort was made, the medium through which each effort was made, and the outcome of each effort with this form, regardless of the level of small, DBE, MBE, WBE, VOSB and/or SDVOSB participation. Examples of required documentation include copies of email communications, copies of newspaper advertisements, or copies of quotations received from interested small businesses, DBEs, MBEs, WBEs, VOSBs or SDVOSBs.

See subsequent page for document.

For detailed information regarding outreach efforts that satisfy the MBE Program's requirements, please see "Documentation Required for Good Faith Efforts and Outreach Plans" page.

Note: The Bidder/Proposer must be willing to report the identity of each subcontractor and the value of each subcontract to MBEP if awarded a contract from this procurement.

Failure to submit the documentation requested may be cause for rejection of the bid. Bidders may include any other documentation deemed relevant to this requirement, which is subject to review by the MBE Liaison. Documentation of Good Faith and Outreach Efforts must be submitted with the bid, regardless of the proposed level of SBEs, DBEs, MBEs, WBEs, VOSBs and/or SDVOSBs participation in the procurement. If the Good Faith and Outreach Effort Form and associated documentation is not submitted with the bid response, the bid may be rejected.

**4. Bidder/ Propose Documentation Good Faith and Outreach Efforts.**

ID	Date	Medium	Outcome	Included Back-Up Documentation
1	9/18/25	Email	Email correspondence with local firm that works with MBE firms to identify potential firms to include on the Team.	Email correspondence
2	9/22/25	Email	Email introduction with MBE firm to set up a call.	Email correspondence
3	9/24/25	Email	Follow-up email to MBE firm requesting information to be included in RFP submittal.	Email correspondence
4	9/30/25	Email	Email correspondence with local firm that works with MBE firms to identify other potential firms to include on the Team.	Email correspondence
5	10/2/25	Email	Email to Minority Business Enterprise Liaison to identify potential firms.	Email correspondence
6	10/2/25	Email	Email correspondence with MBE firm providing scope and fee budget template for them to fill-out.	Email correspondence
7	10/2/25	Email	Email to potential second firm requesting interest to join Team and never heard back.	Email correspondence
8	10/7/25	Email	Email from MBE firm with fee for scope of work, which was included in proposal.	Email correspondence

Subsequent pages include back-up documentation as noted above.



ID - 1

Carlos Perez

From: Stan Harvey <Stan.Harvey@lordaecksargent.com>
Sent: Thursday, September 18, 2025 5:07 PM
To: Carlos Perez; Sarah Boyer
Cc: Jordan Sebastian
Subject: RE: LEX Parks Master Plan

Carlos-

See [below](#).

Stanford Harvey, FAICP

Principal
269 W. Main Street, Suite 500
Lexington, KY 40507
C: 404 312 9145

LORD AECK SARGENT

Responsive Design

LordAeckSargent.com

From: Carlos Perez <cperez@perezpd.com>
Sent: Thursday, September 18, 2025 4:33 PM
To: Stan Harvey <Stan.Harvey@lordaecksargent.com>; Sarah Boyer <Sarah.Boyer@lordaecksargent.com>
Cc: Jordan Sebastian <Jordan.Sebastian@lordaecksargent.com>
Subject: RE: LEX Parks Master Plan

Good afternoon Stan,

It was nice to meet you as well! Thank you for thinking of us!

A couple of follow-up questions/ comments:

- The proposal is still due October 8th, correct? [YES](#)
- I see they have specific DBE/ MBE/ WBE/ and Veteran's/ Disabled Veteran Owned Business Enterprise goals. Do you know firms that could help meet these goals? [FYI, THOSE ARE CITY-WIDE GOALS AND NOT NECESSARILY PROJECT GOALS, BUT THEY WILL WANT MBE PARTICIPATION. TWO SUGGESTIONS- EHI CONSULTANTS COULD BE PART OF THE COMMUNITY ENGAGEMENT STRATEGY WITH CIVIC LEX \(<https://www.ehiconsultants.com/>\) AND ALSO EQUITY/ACCESS. MY ONLY OTHER THOUGHT WOULD BE SOME KIND OF ENVIRONMENTAL CONSULTANT](#)
- \$150k for public engagement sounds about right. For comparison, our Atlanta Plan included \$250K for public engagement, which was given to Park Pride. They also paid for the Statistically Valid Survey. [FWIW, CIVICLEX CAN DO THE SURVEY](#)
- Given what you've learned from CivicLEx, do you think we still have a shot? [YES](#)



ID - 2

Carlos Perez

From: Ryan Holmes <rholmes@ehiconsultants.com>
Sent: Monday, September 22, 2025 11:45 AM
To: Carlos Perez; Stan Harvey
Cc: Jordan Sebastian
Subject: RE: Lexington Parks & Rec Plan

2p works for me.

From: Carlos Perez <cperez@perezpd.com>
Sent: Monday, September 22, 2025 9:50 AM
To: Ryan Holmes <rholmes@ehiconsultants.com>; Stan Harvey <Stan.Harvey@lordaecksargent.com>
Cc: Jordan Sebastian <Jordan.Sebastian@lordaecksargent.com>
Subject: RE: Lexington Parks & Rec Plan

Stan – Than you for the introduction!

Ryan – it is nice to meet you via email! By chance, what does your afternoon look like today? I have some time between 2 pm – 4pm.

Thoughts?

Thanks!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC
404.416.0114
www.perezpd.com
cperez@perezpd.com

From: Ryan Holmes <rholmes@ehiconsultants.com>
Sent: Monday, September 22, 2025 9:31 AM
To: Stan Harvey <Stan.Harvey@lordaecksargent.com>; Carlos Perez <cperez@perezpd.com>
Cc: Jordan Sebastian <Jordan.Sebastian@lordaecksargent.com>
Subject: RE: Lexington Parks & Rec Plan

Thanks for the introduction.

Hi Carlos – Let me know what your schedule looks like this week and we can hop on a call to discuss.

Ryan Holmes, AICP
Principal / Planner

EHI Consultants
Planning, Engineering, Environmental

815 W. Market Street, Suite 304
Louisville, KY 40202



ID - 3

Carlos Perez

From: Carlos Perez
Sent: Wednesday, September 24, 2025 3:36 PM
To: Ryan Holmes
Cc: Thomas Benford
Subject: RE: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

Ryan,

Thank you for the email and thank you for joining our Team!

Wonderful! Thank you to you and Thomas in advance.

Thank you again!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC

404.416.0114

www.perezpd.com

cperez@perezpd.com

From: Ryan Holmes <rholmes@ehiconsultants.com>
Sent: Wednesday, September 24, 2025 3:35 PM
To: Carlos Perez <cperez@perezpd.com>
Cc: Thomas Benford <benford@ehiconsultants.com>
Subject: RE: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

Hey Carlos – Thanks again from bringing us onto the team.

Thomas Benford will start pulling that information together and send to you. Let us know if you need anything else in the meantime. Thanks!

From: Carlos Perez <cperez@perezpd.com>
Sent: Wednesday, September 24, 2025 3:33 PM
To: Ryan Holmes <rholmes@ehiconsultants.com>
Subject: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

Good afternoon Ryan,

Thank you for joining the Perez Planning + Design Team to pursue the above-mentioned project! Kindly see below for the information that we'll need from each firm to include in the proposal:

- **Consultant Team Profiles and References | Due by Wednesday, October 1st COB.**
 - Brief, general business profile that we can include in the proposal.
 - 5 project overviews and references of similar projects specific to the firm's task on the project (Support Public Engagement, Park System Equity Analysis and Recommendations, including exploring intersectionality of Parks and Affordable Housing, and Order of Magnitude Planning Level Opinion of Probable Costs for Park System Improvement recommendations) completed with the last 10-years.



- One page resume for each proposed team member with professional qualifications and relevant experience.
- **Approach, Fee, and Schedule | Thursday, October 2nd COB.**
 - I will send a Draft Project Approach and Schedule by Monday, September 29th to get initial input on the scope as well as fees.
 - I would need comments and fees back by Thursday, October 2nd. I imagine there will be back and forth over the following few days with the goal of wrapping up the fees by Monday, October 6th

Let me know what you think and please reach out with any questions.

Many thanks!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC
404.416.0114
www.perezpd.com
cperez@perezpd.com

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ID - 4

Carlos Perez

From: Stan Harvey <Stan.Harvey@lordaecksargent.com>
Sent: Tuesday, September 30, 2025 12:59 PM
To: Carlos Perez; Kit Anderson
Cc: Richard Young; Jordan Sebastian
Subject: RE: Lexington Parks and Recreation Master Plan Follow-Up

Follow Up Flag: Follow up
Flag Status: Flagged

I don't have a lot of direct experience, but here are a few:

https://wiserstrategies.com/?utm_medium=referral_profile&utm_source=clutch.co

<https://groupcj.com/>

Stanford Harvey, FAICP

Principal
269 W. Main Street, Suite 500
Lexington, KY 40507
C: 404 312 9145

LORD AECK SARGENT

Responsive Design

LordAeckSargent.com

From: Carlos Perez <cperez@perezpd.com>
Sent: Tuesday, September 30, 2025 12:39 PM
To: Kit Anderson <kit@civiclex.org>
Cc: Richard Young <richard@civiclex.org>; Stan Harvey <Stan.Harvey@lordaecksargent.com>; Jordan Sebastian <Jordan.Sebastian@lordaecksargent.com>
Subject: RE: Lexington Parks and Recreation Master Plan Follow-Up

Kit,

As a follow-up to our conversation last week, any thoughts on a PR firm? We discussed 418 Communications. Is that still a good firm? Any other firm that comes to mind that is MBE?

Thank you again!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC

404.416.0114
www.perezpd.com
cperez@perezpd.com



ID - 5

Carlos Perez

From: Carlos Perez
Sent: Thursday, October 2, 2025 2:23 PM
To: 'Sherita Miller'
Subject: RE: RFP #32-2025 Parks and Recreation Master Plan

Sherita,

Thank you kindly for the email response! This is all very helpful!

Thank you again!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC

404.416.0114

www.perezpd.com

cperez@perezpd.com

From: Sherita Miller <smiller@lexingtonky.gov>
Sent: Thursday, October 2, 2025 2:07 PM
To: Carlos Perez <cperez@perezpd.com>
Subject: RE: RFP #32-2025 Parks and Recreation Master Plan

Hi Carlos,

Attached is a copy of LFUCG's certified list. This is an overall list of business with various specialties. In addition, below are other entities that maintain lists.

Kentucky Transportation Cabinet (KYTC), Disadvantaged Business Enterprise (DBE) Program,
<http://transportation.ky.gov/Civil-Rights-and-Small-Business-Development/Pages/default.aspx> .

Kentucky Minority and Women Business Enterprise (MWBE) Certification Program,
<http://mwbe.ky.gov/Pages/default.aspx>

Thanks, Sherita

Sherita Miller, MPA, CPSD
Minority Business Enterprise Liaison
Division of Procurement

859.258.3323 office
lexingtonky.gov



LEXINGTON





1775 – 2025

From: Carlos Perez <cperez@perezpd.com>
Sent: Thursday, October 2, 2025 1:26 PM
To: Sherita Miller <smiller@lexingtonky.gov>
Subject: RFP #32-2025 Parks and Recreation Master Plan

You don't often get email from cperez@perezpd.com. [Learn why this is important](#)

[EXTERNAL] Use caution before clicking links and/or opening attachments.

Good afternoon Ms. Miller,

Our firm is pursuing RFP #32-2025 Parks and Recreation Master Plan.

Would you be able to kindly share the list of organizations that certify and/or maintain lists of certified businesses (i.e. DBE, MBE, WBE, VOSB and/or SDVOSB)?

Thank you kindly!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC
404.416.0114
www.perezpd.com
cperez@perezpd.com

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ID - 7

Carlos Perez

From: Carlos Perez
Sent: Thursday, October 2, 2025 7:54 PM
To: 'creative@wiserstrategies.com'
Subject: Message for Risa Richardson | Lexington Parks and Recreation Master Plan RFP
Attachments: Lexington PRMP RFP.pdf

Good evening Wiser Strategies!

This message is for Risa Richardson, who I understand from your website works with Firm's Public Relations Services, or someone in the Firm that may be able to help.

My name is Carlos Perez with Perez Planning + Design, based out of Atlanta, GA. We are leading a Team of consultant to pursue the attached Lexington-Fayette Urban County Government Parks and Recreation Master Plan Request for Proposal (RFP), due next Wednesday, October 6, 2025 via online portal.

We are looking for a local Lexington, WBE Firm to assist us with Public Relations Services for this project. Specifically, we would be looking for a firm to assist our team with the following:

- Reviewing and/ or creating messaging to promote the project's public engagement opportunities (e.g., public meetings, events, and online surveys).
- Multi-channel promotion of the project's public engagement opportunities.
- Creating one, potentially two short videos to promote the process. (Click [here](#) to see an example of a video that we worked with the City of Knoxville to create for the Knoxville Parks and Recreation Master Plan).

Let me know if this is something that you may be interested in helping us out with, considering the short turn around for RFP content which would include Firm Bio, Examples of Similar Lexington Work, Resumes, and Fee.

Thank you kindly for your time and attention to this email.

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC

404.416.0114

www.perezpd.comcperez@perezpd.com

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ID - 8

Carlos Perez

From: Ryan Holmes <rholmes@ehiconsultants.com>
Sent: Tuesday, October 7, 2025 4:19 PM
To: Carlos Perez
Cc: Stan Harvey
Subject: RE: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

Hey Carlos – The requested documents/fee budget are attached. Let me know if you need anything else. Thanks!

From: Carlos Perez <cperez@perezpd.com>
Sent: Tuesday, October 7, 2025 2:17 PM
To: Ryan Holmes <rholmes@ehiconsultants.com>
Cc: Stan Harvey <stan.harvey@lordaecksargent.com>
Subject: RE: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

Good afternoon Ryan,

Hope all is well!

Wanted to follow-up on the email below to see if you had any questions. Thoughts on when you would be able to share EHI's fee?

Please remember to include hourly rates of staff who will be working on the project since we'll have to include those.

Thanks!

Carlos F. Perez, PLA
Principal

Perez Planning + Design, LLC
404.416.0114
www.perezpd.com
cperez@perezpd.com

From: Carlos Perez
Sent: Thursday, October 2, 2025 3:29 PM
To: Ryan Holmes <rholmes@ehiconsultants.com>
Cc: Stan Harvey <stan.harvey@lordaecksargent.com>
Subject: RE: Lexington-Fayette Urban County Government RFP# 32-2025 Parks and Recreation Master Plan Response Needs

ID - 6

Good afternoon Ryan,

As a follow-up to the email below, kindly see attached for the scope items that we would look to EHI to assist us with. I also included a fee budget for you to use to include your Billable Rates (which the City is asking for) and the numbers of hours per task to inform fees.

As it relates to fees for public engagement support, that will be based on the number of Sectors/ Planning Areas referenced in the emails below. Thoughts?

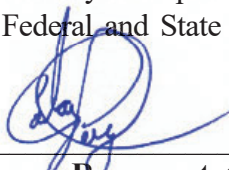


The undersigned acknowledges that all information is accurate. Any misrepresentations may result in termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and claims.

Perez Planning + Design, LLC

Company
10/7/25

Date


Carlos Perez

Company Representative
President

Title

4870-1925-6809, v. 1



GENERAL PROVISIONS

1. Each Respondent shall comply with all Federal, State & Local regulations concerning this type of service or good.

The Respondent agrees to comply with all statutes, rules, and regulations governing safe and healthful working conditions, including the Occupational Health and Safety Act of 1970, *29 U.S.C. 650 et. seq.*, as amended, and KRS Chapter 338. The Respondent also agrees to notify the LFUCG in writing immediately upon detection of any unsafe and/or unhealthful working conditions at the job site. The Respondent agrees to indemnify, defend and hold the LFUCG harmless from all penalties, fines or other expenses arising out of the alleged violation of said laws.

2. Failure to submit ALL forms and information required in this RFP may be grounds for disqualification.
3. Addenda: All addenda and IonWave Q&A, if any, shall be considered in making the proposal, and such addenda shall be made a part of this RFP. Before submitting a proposal, it is incumbent upon each proposer to be informed as to whether any addenda have been issued, and the failure to cover in the bid any such addenda may result in disqualification of that proposal.
4. Proposal Reservations: LFUCG reserves the right to reject any or all proposals, to award in whole or part, and to waive minor immaterial defects in proposals. LFUCG may consider any alternative proposal that meets its basic needs.
5. Liability: LFUCG is not responsible for any cost incurred by a Respondent in the preparation of proposals.
6. Changes/Alterations: Respondent may change or withdraw a proposal at any time prior to the opening; however, no oral modifications will be allowed. Only letters, or other formal written requests for modifications or corrections of a previously submitted proposal which is addressed in the same manner as the proposal, and received by LFUCG prior to the scheduled closing time for receipt of proposals, will be accepted. The proposal, when opened, will then be corrected in accordance with such written request(s), provided that the written request is contained in a sealed envelope which is plainly marked "modifications of proposal".
7. Clarification of Submittal: LFUCG reserves the right to obtain clarification of any point in a bid or to obtain additional information from a Respondent.
8. Bribery Clause: By his/her signature on the bid, Respondent certifies that no employee of his/hers, any affiliate or Subcontractor, has bribed or attempted to bribe an officer or employee of the LFUCG.



9. Additional Information: While not necessary, the Respondent may include any product brochures, software documentation, sample reports, or other documentation that may assist LFUCG in better understanding and evaluating the Respondent's response. Additional documentation shall not serve as a substitute for other documentation which is required by this RFP to be submitted with the proposal,
10. Ambiguity, Conflict or other Errors in RFP: If a Respondent discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, it shall immediately notify LFUCG of such error in writing and request modification or clarification of the document if allowable by the LFUCG.
11. Agreement to Bid Terms: In submitting this proposal, the Respondent agrees that it has carefully examined the specifications and all provisions relating to the work to be done attached hereto and made part of this proposal. By acceptance of a Contract under this RFP, proposer states that it understands the meaning, intent and requirements of the RFP and agrees to the same. The successful Respondent shall warrant that it is familiar with and understands all provisions herein and shall warrant that it can comply with them. No additional compensation to Respondent shall be authorized for services or expenses reasonably covered under these provisions that the proposer omits from its Proposal.
12. Cancellation: If the services to be performed hereunder by the Respondent are not performed in an acceptable manner to the LFUCG, the LFUCG may cancel this contract for cause by providing written notice to the proposer, giving at least thirty (30) days notice of the proposed cancellation and the reasons for same. During that time period, the proposer may seek to bring the performance of services hereunder to a level that is acceptable to the LFUCG, and the LFUCG may rescind the cancellation if such action is in its best interest.

A. Termination for Cause

- (1) LFUCG may terminate a contract because of the contractor's failure to perform its contractual duties
- (2) If a contractor is determined to be in default, LFUCG shall notify the contractor of the determination in writing, and may include a specified date by which the contractor shall cure the identified deficiencies. LFUCG may proceed with termination if the contractor fails to cure the deficiencies within the specified time.
- (3) A default in performance by a contractor for which a contract may be terminated shall include, but shall not necessarily be limited to:
 - (a) Failure to perform the contract according to its terms, conditions and specifications;
 - (b) Failure to make delivery within the time specified or according



- to a delivery schedule fixed by the contract;
- (c) Late payment or nonpayment of bills for labor, materials, supplies, or equipment furnished in connection with a contract for construction services as evidenced by mechanics' liens filed pursuant to the provisions of KRS Chapter 376, or letters of indebtedness received from creditors by the purchasing agency;
- (d) Failure to diligently advance the work under a contract for construction services;
- (e) The filing of a bankruptcy petition by or against the contractor; or
- (f) Actions that endanger the health, safety or welfare of the LFUCG or its citizens.

B. At Will Termination

Notwithstanding the above provisions, the LFUCG may terminate this contract at will in accordance with the law upon providing thirty (30) days written notice of that intent. Payment for services or goods received prior to termination shall be made by the LFUCG provided these goods or services were provided in a manner acceptable to the LFUCG. Payment for those goods and services shall not be unreasonably withheld.

13. **Assignment of Contract:** The contractor shall not assign or subcontract any portion of the Contract without the express written consent of LFUCG. Any purported assignment or subcontract in violation hereof shall be void. It is expressly acknowledged that LFUCG shall never be required or obligated to consent to any request for assignment or subcontract; and further that such refusal to consent can be for any or no reason, fully within the sole discretion of LFUCG.
14. **No Waiver:** No failure or delay by LFUCG in exercising any right, remedy, power or privilege hereunder, nor any single or partial exercise thereof, nor the exercise of any other right, remedy, power or privilege shall operate as a waiver hereof or thereof. No failure or delay by LFUCG in exercising any right, remedy, power or privilege under or in respect of this Contract shall affect the rights, remedies, powers or privileges of LFUCG hereunder or shall operate as a waiver thereof.
15. **Authority to do Business:** The Respondent must be a duly organized and authorized to do business under the laws of Kentucky. Respondent must be in good standing and have full legal capacity to provide the services specified under this Contract. The Respondent must have all necessary right and lawful authority to enter into this Contract for the full term hereof and that proper corporate or other action has been duly taken authorizing the Respondent to enter into this Contract. The Respondent will provide LFUCG with a copy of a corporate resolution authorizing this action and a letter from an attorney confirming that the proposer is authorized to do business in the State of Kentucky if requested. All proposals must



be signed by a duly authorized officer, agent or employee of the Respondent.

16. **Governing Law:** This Contract shall be governed by and construed in accordance with the laws of the Commonwealth of Kentucky. In the event of any proceedings regarding this Contract, the Parties agree that the venue shall be the Fayette County Circuit Court or the U.S. District Court for the Eastern District of Kentucky, Lexington Division. All parties expressly consent to personal jurisdiction and venue in such Court for the limited and sole purpose of proceedings relating to this Contract or any rights or obligations arising thereunder. Service of process may be accomplished by following the procedures prescribed by law.
17. **Ability to Meet Obligations:** Respondent affirmatively states that there are no actions, suits or proceedings of any kind pending against Respondent or, to the knowledge of the Respondent, threatened against the Respondent before or by any court, governmental body or agency or other tribunal or authority which would, if adversely determined, have a materially adverse effect on the authority or ability of Respondent to perform its obligations under this Contract, or which question the legality, validity or enforceability hereof or thereof.
18. Contractor understands and agrees that its employees, agents, or subcontractors are not employees of LFUCG for any purpose whatsoever. Contractor is an independent contractor at all times during the performance of the services specified.
19. If any term or provision of this Contract shall be found to be illegal or unenforceable, the remainder of the contract shall remain in full force and such term or provision shall be deemed stricken.
20. Contractor [or Vendor or Vendor's Employees] will not appropriate or make use of the Lexington-Fayette Urban County Government (LFUCG) name or any of its trade or service marks or property (including but not limited to any logo or seal), in any promotion, endorsement, advertisement, testimonial or similar use without the prior written consent of the government. If such consent is granted LFUCG reserves the unilateral right, in its sole discretion, to immediately terminate and revoke such use for any reason whatsoever. Contractor agrees that it shall cease and desist from any unauthorized use immediately upon being notified by LFUCG.

Signature

10/7/25

Date



LEXINGTON

EXHIBIT "C"

Part 1 Negotiated Scope

Lexington Fayette Urban County Government

Parks and Recreation Master Plan Part 1 Negotiated Scope of Work

Part 1

Phase 1 – Context Analysis

Phase I is designed to establish a strong foundation for the parks and recreation master planning process through the analysis of three Contexts:

- **Planned Context** - Review of previous LFUCG planning studies.
- **Demographic Context** - Review of LFUCG's existing and projected demographics.
- **Park System Context** - Assessment of the existing conditions of the parks system.

Following are the tasks that PP+D proposes to complete for Phase1-Context Analyses.

1.1. Project Management + Coordination: PP+D will coordinate our work with the LFUCG's Project Manager. PP+D will hold regular bi-weekly meetings with LFUCG Staff to review progress, present information, and discuss the direction of remaining portions of the project. It is envisioned that one of the bi-weekly meetings will include a meeting with City Administration to provide an update of the process.

In an effort to keep the project on schedule, we have found that pre-scheduling project milestone dates such as deliverable submittal dates, LFUCG review periods, public engagements, presentations, etc., is key to the project remaining on schedule. PP+D will submit a project schedule to the LFUCG and revise per written comments provided by the LFUCG.

1.2. Project Branding: PP+D proposes to develop three project branding options for the LFUCG including logos, fonts, and colors and submit them to the LFUCG for review. PP+D will revise one of the selected options per the LFUCG's comments and develop a final brand for the project. PP+D will then use the logo to develop business cards for the project that can be distributed to encourage participation in the planning process. Additionally, the project brand will be included in all project documents.

1.3. Interactive Project Website: The PP+D Team will develop an interactive project website for the project. We propose using third party providers such as Publicinput.com, Social Pinpoint, ArcGIS Survey 123 or similar that allow the project to not only have a presence on the internet but also allow visitors to provide feedback about the process as desired by the LFUCG in multiple languages.

For Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment, we envision the interactive website providing two primary exercises:

- **Interactive Map** - This exercise allows users to navigate throughout the City and provide comments related to topics desired by the LFUCG. The PP+D Team will work with the LFUCG to identify those topics.
- **Brief Introductory Survey**- The PP+D Team will work with the LFUCG to develop a brief introductory survey to collect preliminary input on the Master Plan process. CivicLex would analyze the findings and integrate the findings into the Context Analysis Summary Report.

1.4. Lexington Parks and Recreation Staff and Executive Committee Project Kick-Off Meetings: PP+D will complete in-person Kick-Off Meetings with Parks and Recreation Staff and the Executive Committee.

The purpose of these kick-off meetings will be to review the project scope, schedule, expectations, roles and responsibilities. Specifically, the Kick-Off Meeting may cover, but may not be limited to covering the following:

- Documentation, and data requests, and project schedule.
- Preliminary discussion of department needs, concerns, political climate, general number and condition of existing amenities, known demographic, crime data, population health and wellness data, community health data, past planning efforts by the LFUCG, etc.
- Discuss existing reports, capital improvement plans, area plans, GIS data, mapping, and other relevant information to familiarize the PP+D Team with past efforts and current programs and determine what other information should be gathered.
- Project promotional strategies including, but not limited to traditional and digital strategies such as promotional project business cards, flyers, mailers, door hangers, restaurant table promotional tents, radio interviews, park yard signs, email blasts, social media posts, social media ads, robocalls, promotional videos, etc.

PP+D will develop a meeting summary and submit it to the LFUCG for review.

1.5. City Administration Project Kick-Off Meeting: PP+D will also complete an in-person Kick-Off Meeting with City Administration. The purpose of these kick-off meetings will be reviewing the project scope, schedule, goals, objectives, expectations, potential issues, and concerns. PP+D will develop a meeting summary and submit it to the LFUCG for review.

1.6. Parks and Recreation Advisory Board Project Kick-Off Meeting: PP+D also proposes completing an in-person Kick-Off Meeting with the Parks and Recreation Advisory Board. The purpose of this kick-off meeting will be to introduce the Advisory Board to the project team, review project scope, schedule, expectations, roles, responsibilities and receive preliminary input from the Advisory Board about parks and recreation needs, priorities, issues, and opportunities. PP+D will develop a meeting summary and submit it to the LFUCG for review.

1.7. Public Kick-off Event: Representatives from PP+D, CivicLex, and Lord Aeck Sargent (LAS) will work with the LFUCG to prepare and facilitate a Public Kick-Off Event for the Parks and Recreation Master Plan. It is envisioned that this Public Kick-Off Event will be combined with an existing City special event, potentially the St. Patrick's Day Special Event. PP+D Team Members will prepare exercises to collect input from event attendees and informational content about the Master Plan to share with attendees. PP+D will collect and tally the results from the event to include in the Master Plan.

1.8. Review of Existing Conditions: Parks and Recreation Master Plans are never completed in a vacuum. EHI will complete an existing plan and context review for all relevant surveys, studies, and planning documents from the LFUCG that may influence the plan provided by the LFUCG, including:

- Previous park master plans
- Park and recreation sites inventory and assessments
- Community plans and studies
- GIS data and mapping
- Survey data and information on community needs and desires

EHI will provide a brief summary of the documents to identify relevant data that may include but may not be limited to existing and proposed goals, objectives, policies, initiatives, standards, projects, and document data matrix to help maintain an inventory of the existing information.

1.9. Demographic Analysis: Critical to meet CAPRA Standard 10.5.1, PP+D will utilize current and projected demographic data to understand what the community looks like now and what it may look like in 5 and in 10-years.

PP+D will analyze population composition, population growth projection and trends, and socio-economic factors to prepare charts and graphs illustrating the LFUCG's actual growth, projected growth, and community health challenges. PP+D will work with the LFUCG to determine appropriate data sources to use, which may include data from Environmental Systems Research Institute, Inc. (ESRI), the LFUCG, and the State. PP+D will look at the data by census tract, Park Planning Districts, and citywide when evaluating service areas.

Similar to other projects that PP+D has worked on, the PP+D Team will work with Staff to organize the LFUCG into up to six (6) Park Planning Districts. The organization of these Park Planning Districts is typically primarily informed by population, population density, and infrastructure. The PP+D Team can also overlay other data sets such demographic, socio-economic data, and findings from the Comprehensive Opportunity Assessment that Team member EHI is currently completing for LFUCG Parks and Recreation to further inform the organization of Park Planning Districts. Establishing these Park Planning Districts will be a critical step in the process and will be used to guide public engagement input and analysis of findings.

PP+D will review, identify, and summarize trends, and graphically depict key findings in charts, graphs, and narratives.

1.10. National, Regional, and Local Recreation and Leisure Trends and Market Demand Analysis: PROS Consulting, NGF Consulting, and Counsilman-Hunsaker will develop a National, Regional, and Local Recreation and Leisure Trends Analysis as follows:

- **Parks and Recreation:** PROS Consulting will complete a Trends Analysis that provides an understanding of national, regional, and local recreational trends as well as recreational interest by age segments.

It will include but not be limited to data collection and analysis, AI tools, marketing, programming and management of historically significant spaces, natural areas and naturalized spaces, recreational outreach programs, and engagement and volunteering of all ages.

Trends data used for this analysis will be obtained from sources including, but not limited to Sports & Fitness Industry Association's (SFIA), National Recreation and Park Association (NRPA), Environmental Systems Research Institute, Inc. (ESRI), etc. Where applicable, trend data is based on current and/or historical participation rates, statistically valid survey results, or NRPA Park Metrics.

The Sports & Fitness Industry Association's (SFIA) current Sports, Fitness & Leisure Activities Topline Participation Report is also utilized in evaluating the following trends:

- National Recreation Participatory Trends
- Core vs. Casual Participation Trends

The purpose of the report is to establish levels of activity and identify key participatory trends in recreation across the U.S. The study will look at 120 different sports/activities and will subdivide them into various categories including: sports, fitness, outdoor activities, etc.

- **Golf:** NGF Consulting will analyze the supply/ demand dynamic that is driving the competitive public access golf market in the greater Lexington market. They will document relevant local competition in terms of relative quality, programs offered, fee structures, and trends in activity so that we can identify the appropriate programming, price, value and mix of amenities for Lexington golf facilities. They will also identify key golf participation and activity trends in the population, as well as emerging trends in golf service that may impact the continued operation of LFUCG golf facilities.
- **Aquatics:** Counsilman-Hunsaker will analyze national, regional, and local aquatics trends, including weather analysis and economic considerations that may affect the future viability of aquatics facilities. Additionally, they will study other area aquatic providers to better understand the aquatic services and facilities that are provided in the region and the fees that are being charged for those services. This information will also be used as a benchmark when comparing the services offered by the LFUCG's aquatic facilities as opposed to the similar area providers.

The PP+D Team will organize this information into a summary document with key findings.

1.11. Inventory + Base Map: Critical to meeting CAPRA Standard 10.4, the PP+D Team will work collaboratively with staff to compile a comprehensive inventory of the existing and planned parks and facilities based on data provided by the LFUCG.

EHI will use and build on the existing work with the LFUCG to develop a comprehensive inventory that includes park type, park location, acreage, the number of benchmarkable indoor and outdoor facilities and amenities in parks, existing plans, and available programs and events. EHI will also provide a GIS-based map that will illustrate the location, type of park, pedestrian, bicycle, and vehicular access.

The PP+D Team will submit the base map and inventory for the LFUCG's review to ensure accuracy and consistency and will revise according to the written comments provided by the LFUCG.

1.12. Park System Evaluation: Critical to meet CAPRA Standard 10.4, PP+D Team members will visit a representative sample of up to forty (40) parks to photograph and document the existing conditions of a representative sample of the LFUCG's parks and recreation system as follows:

- **Parks, Recreation Facilities, Indoor Centers, and Aquatic Facilities:** Completed by PP+D, LAS, and Counsilman-Hunsaker.
 - Prior to these visits, the PP+D Team will work with the LFUCG to review and if desired, modify our Team's Parks Evaluation Form to analyze the LFUCG's parks and recreation system, based on the expressed values of the community. The form is a result of our Team's experience in completing over 500 Parks and Recreation Master Plans nationwide and uses criteria adapted from Project for Public Spaces (PPS) methodology for evaluating the effectiveness and performance of the public space. While completing park evaluations, the Team would randomly interview park users, dog walkers, joggers, and other residents/ visitors we encounter to collect input on the parks and recreation system.
- **Golf Facilities:** Completed by NGF Consulting and Kevin Hargrave Golf Course Architect.

- NGF Consulting will conduct an evaluation of all five golf facilities while Kevin Hargrave will conduct an evaluation of two representative golf facilities to prepare a review of potential enhancements that could be made to: (1) improve revenue performance; (2) reduce environmental “footprint;” and/or (3) reduce expenses in the golf system operation. Key areas to provide a representative summary review will include:
 - Representative golf layout, playability and quality standards
 - Maintenance practices and budget
 - Representative – irrigation and drainage
 - Representative equipment, including long-term plan for replacement
 - Representative summary with list of objectives
 - Representative long-range recommendations shown as ‘options’ for further study

These evaluations help PP+D develop a “baseline” understanding of how well the current system functions and meets the community’s needs. These findings will be illustrated at the citywide and Park Planning District levels and would be used to develop a Quality LOS map that illustrates how a representative the quality of parks, recreation facilities, indoor centers, aquatics facilities, and golf courses compare throughout the system. Additionally, the findings would be used to provide representative park system capital improvements.

1.13. Recreation Program Plan: Identified as a Fundamental Standard for CAPRA Accreditation (Standard 6.1), PROS Consulting, in coordination with Counsilman-Hunsaker (CH) and the National Golf Foundation Consulting (NGF) will develop a Recreation Program Plan that will be aligned with the Parks and Recreation Master Plan. Findings from this task will inform recommendations provided in Phase 3 - Vision and Phase 4 - Implementation.

Following are the tasks that will be completed during Phase 1 - Context Analysis:

- **Inventory and Assessment of Current Programming and Services** - PROS Consulting, in coordination with CH and NGF, will complete a comprehensive multi-stakeholder program map using their proven assessment framework that systematically analyzes all programming across relevant organizations and documents the following detailed program analysis components:
 - **Age Segment Distribution** - Program offerings across all age demographics
 - **Lifecycle Analysis** - Programs addressing different life-stages and transitions
 - **Core Program Analysis** - Identification of mission-critical programming for each organization
 - **Similar Provider Analysis** - Assessment of service duplication and coordination opportunities
 - **Market Position and Marketing Analysis** - How each organization positions and promotes services
 - **Pricing Structure and Cost Recovery** - Fee analysis and financial sustainability assessment
 - **Program Development Process Review** - How new programs are created and evaluated
 - **Customer Satisfaction Metrics** - Participant feedback and retention analysis
 - **Registration Trends** - Participation patterns and demand indicators
 - **Current KPIs** - Existing performance measurement systems
 - **Staff Training and Development** - Capacity and professional development assessment

The program inventory will produce a comprehensive index of all recreation offerings structured to allow annual updates and ongoing KPI monitoring. This assessment format will be customized to

interface existing organizational systems while providing cross-stakeholder comparison capabilities.

Next, PROS Consulting in coordination with CH and NGF, will ensure that recreation and service offerings are integrated with national benchmarks and community needs. This will include the following elements:

- **NRPA Standards Application** - Comparing current service levels against National Recreation and Park Association best practices for demographics and population density
 - **Sports & Fitness Industry Association Trends** - Identifying emerging programming opportunities aligned with national participation patterns
 - **Demographically Similar Communities** - Benchmarking against jurisdictions with comparable diversity, population density, and multi-stakeholder service delivery
 - **Statistically Valid Needs Assessment** - Provides community priorities on recreation programs and facilities
- **Core Recreational Planning Principles Assessment** - PROS Consulting analysis will evaluate how well current programming aligns with fundamental recreational planning principles:
 - **Connectivity of Resources** - Integration across facilities and organizations
 - **Inclusivity and Equity** - Celebrating diversity and promoting access and opportunity
 - **Sustainability** - Infrastructure and practice longevity
 - **Program Activation** - Supporting physical, mental, and social wellness

Lastly, PROS Consulting in coordination with CH and NGF will identify unmet current and future needs in programming and services. This will include the following elements:

- **Current Needs Analysis** - PROS Consulting will assess whether the current recreation mix meets community needs by analyzing:
 - Participation rates vs. demand across demographic segments
 - Waitlists, capacity constraints, and unmet demand indicators
 - Geographic access patterns and transportation barriers
 - Cultural and linguistic accessibility of current programming
- **Future Programming Assessment** - PROS Consulting will analyze emerging needs based on:
 - Demographic projections and community growth patterns
 - National recreation trends and evolving participation patterns
 - Community input on desired programming from Task 2 engagement
 - Coordination opportunities identified through stakeholder analysis

1.14. Staffing, Operations, and Management Assessment: PROS Consulting and NGF will complete an assessment of staffing, operations, and management for the parks and recreation system and golf and concession operations respectively. Specifically, this assessment will include the following:

- **Parks and Recreation System:** Evaluate each area of operations and focus on right-staffing not just right-sizing.
 - Evaluate policy and procedure to ensure consistent implementation system-wide
 - Determine whether the organizational structure is aligned to the community's vision, mission, and goals
 - Create a functional, outcome-driven agency

- **Golf and Concession Operations:** Complete a system-wide review of the golf and concession operations of the five-facility Lexington golf system to provide the necessary background to make proper program and facility recommendations aimed at understanding the long-term sustainability of this multi-facility golf system. This will include a global assessment of the amenities and services that can lead to improved economic performance and long-term sustainability of Lexington golf courses. The global operations analysis will include review of:
 - Staffing/personnel review and needs/ duties assessment
 - Financial and activity records (P&L, budgets, rounds, etc.)
 - Rounds played analysis (POS review)
 - Product and service offerings and market position
 - Fee review (golf, carts, passes, F&B, merchandise, etc.)
 - Clubhouse operations (F&B, pro shop, etc.)
 - Programs in place (service, lessons, tournaments, etc.)

1.15. Context Analysis Summary Document: PP+D will compile all the information and data completed for Phase I and will develop a summary document. The Context Analysis Summary will identify major issues, concerns, challenges, opportunities, and constraints. PP+D will submit the summary document to the LFUCG for review and will make revisions per the LFUCG's written comments.

Phase 1-Context Analysis Deliverables:

- **Draft and Final Phase 1- Context Analysis Summary**
- **Document + Power Point Presentation**
 - **Summary of Community Analysis Methodology**
 - **Community Analysis Findings**
 - **Inventory and Condition of *Representative* Existing Park and Recreation Facilities**
- **Appendix with all data collected**

Phase 2 – Needs and Priorities Assessment

Critical to meeting CAPRA Standard 10.4, we approach needs assessments using three different data analyses: primary qualitative analysis, primary quantitative analysis, and secondary data analysis. Where the findings from these data analyses intersect, suggest needs and priorities. PP+D will use this strategy to determine needs and priorities at the citywide and Park Planning District levels. While the secondary data analysis are covered in Phase 1, Phase 2 focuses on the primary qualitative and primary quantitative analyses. The primary qualitative analyses are all based on PP+D's philosophy for public engagement:

"Bring me in early, and I'm your partner. Bring me in late, and I'm your judge"

Our process aims to work collaboratively with the LFUCG and use a variety of techniques to promote and implement well-organized and directed activities, techniques, and formats that will ensure that a positive, open, and proactive public participation process is achieved. Following are the tasks that the PP+D Team proposes to complete for the Needs and Priorities Assessment Phase.

2.1. Meeting with Executive Committee: PP+D will conduct a second in-person meeting with the Executive Committee. The purpose of this meeting will be to collect input about parks, recreation, community health, and funding needs and priorities. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.2. Meeting with City Administration: PP+D will also conduct a second in-person meeting with City Administration. Similar to the second Executive Committee Meeting, the purpose of this meeting will be to collect input about parks, recreation, community health, and funding needs and priorities. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.3. One-on-One Meetings with City Council Members: PP+D will also conduct virtual one-on-one meetings with City Council Members. We have found that these one-on-one meetings are invaluable for obtaining candid information and insights that help inform and address the priority parks and recreation needs and opportunities within the community. PP+D will develop a meeting summary and submit it to the LFUCG for review.

2.4. Community Conversations: CivicLex and EHI will facilitate up to six community conversations, or listening sessions based on established Park Planning Districts to introduce the parks and recreation master plan and gather information about parks needs across the LFUCG. The listening sessions will be hosted in friendly, accessible locations in each district (parks, libraries, restaurants, etc.) and broadly promoted digital, print, and relational methods. The listening sessions will include open house style activities to maximize accessibility and focus on key elements of community needs (e.g. access, features, programming).

2.5. Stakeholder Meetings: CivicLex will conduct a series of approximately 15 initial focus groups with key stakeholders and parks users. These focus groups will be structured with a brief introduction on the context of the plan, followed by a facilitated conversation about different group needs and their vision for the next 10 years of parks in Lexington.

Finally, each focus group member will complete a written reflection to gather direct quotes and quantitative insights. Stakeholder groups would be developed in consultation with LFUCG Parks and Recreation and project advisors, but could include people with disabilities, kids and young adults, arts and culture organizations, maintenance workers, recreation groups, or environmental groups. CivicLex could also have the capacity to convene a randomly selected focus group to work towards a representative sample of residents giving parks input.

2.6. Event Engagement: Working with the project team and advisory group, CivicLex will design creative, visually inviting, and interactive pop ups that can be implemented at different parks events and community locations. Using arts based or gamified approaches, these pop ups will invite participants to learn about Lexington's parks, share their reflections, and gather qualitative or quantitative data on the needs of different communities, geographically targeted according to each Parks Planning District. Working with Parks staff and advisors, the project team and LFUCG Staff can implement the pop ups at signature high volume parks events (e.g. St. Patrick's Day Parade (to be used as the Public Kick-Off Event), Kite Fest, Friday Flicks, Fourth of July Parade, or Dirt Bowl), in addition to more neighborhood focused events, and community locations (transit center, grocery stores, schools) that can engage future parks users.

2.7. Statistically Valid Survey: PP+D will work with ETC Institute to create a statistically valid mail survey that will provide results that have a margin of error of +/-3.1% at the 95% level of confidence at the citywide level and a margin of error of +/-8.0% at the 95% level of confidence at up to six Park Planning Districts. Following are the steps that PP+D and ETC will take to complete the Statistically Valid Survey.

Step 1: Design the Survey and Prepare the Sampling Plan:

- PP+D and ETC will work with the LFUCG to develop a questionnaire that is appropriate for the LFUCG. ETC will meet by phone with the LFUCG to discuss the goals and objectives for the project.
- To facilitate the survey design process, ETC Institute will provide sample surveys created for similar projects. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the LFUCG. The survey will be up to 6 pages in length.
- ETC will then conduct a pilot test of the survey to ensure the questions are understood by residents. Based on the results of the pilot test, ETC Institute may recommend changes (if needed) to the survey.
- Once finalized, the survey will be translated into up to 10 languages. While the printed and mailed survey will only be made available in English. The materials that are mailed will include lines in additional languages to inform non-English speakers that they can either go online or call a toll-free number to have the survey administered online or over the phone in another language.
- Next, ETC will select a random sample of residents to be contacted for the survey. The sample will be address-based and will ensure all households within the study area have an equal opportunity of being selected to participate in the random sample research group.

Step 2: Administer the Survey:

- Once approved by the LFUCG, ETC will Administer the survey by a combination of mail and online.
- ETC will mail the survey and a cover letter (on LFUCG letterhead) to a random sample of households in the study area. Only one survey per household will be sent. Postage-paid envelopes will be provided by ETC for each respondent.
- PP+D will work the LFUCG to develop the cover letter for the mailed survey. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it on-line.
- ETC will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC's fees including printing and mailing up to 58,000 surveys and 58,000 postcards. The goal will be to obtain completed surveys from 61,000 residents. A sample of 61,000 completed surveys will provide results that have a margin of error of +/-3.14% at the 95% level of confidence citywide. ETC will ensure a statistically valid number of responses is collected from up to six Park Planning Districts to provide a margin of error of +/-8.0% at the 95% level of confidence.
- ETC will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- All respondents who complete the survey online will be required to provide their home address when they finish the survey. ETC will match addresses from respondents who complete the survey online to the addresses that were selected for the random sample to ensure the participant is part of the random sample. If a respondent does not provide an address or the address is not part of the random sample, it will not be included.
- ETC will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the study area with regard to geographic dispersion, age, gender, race/ethnicity and other factors. ETC will weight the data as needed if one or more demographic groups is over/underrepresented relative to recent Census estimates for the LFUCG's population.

Step 3: Analysis, Final Report, and Interactive Data Dashboard:

- ETC will submit a final report that will include the following items:

- An executive summary of the survey methodology and a description of major findings.
- Charts and graphs that show the overall results of each question on the survey, including trends from prior surveys.
- Benchmarking analysis showing how the LFUCG compares to other communities.
- Priorities-Investment Rating analysis that will identify the facilities and programs that should receive the highest priority for investment from the LFUCG, citywide and per up to six Park Planning Districts.
- Cross-tabulations that show the results for key demographic groups, Park Planning Districts, and other variables as desired by the LFUCG.
- Tabular data that shows the results for each question on the survey, including open ended questions.
- A copy of the survey instrument

2.8. Online Survey: Once the Statistically Valid Survey is completed, CivicLex will complete an online survey via Survey Monkey or a similar on-line survey platform that the LFUCG is comfortable with to provide an opportunity for residents that did not receive the Statistically Valid Survey, to share their input and therefore expand the reach of public engagement.

This allows us to compare the findings from both survey techniques to identify potential trends and special interest group needs that may not emerge in the unbiased and random Statistically Valid Survey. CivicLex will compile the findings from the online survey into a summary report of findings and provide the City both with the summary as well as the raw survey results.

2.9. Existing Level of Service Analysis: Unlike other planning disciplines such as transportation, wastewater, potable water, etc., there are no standards or guidelines for the Level of Service (LOS) that parks and recreation departments should provide their residents. In order to assist the LFUCG in developing appropriate LOS standards, PP+D will analyze existing LOS for the following elements to establish a baseline understanding of the LFUCG's current LOS:

- **Acreage LOS** – Acreage in a ratio to the community's population (acres per 1,000) per Park Planning District and city-wide.
- **Indoor Recreation Center and Aquatics Space LOS** – Quantity of square footage of indoor recreation centers and aquatics facilities space per capita citywide and Park Planning District.
- **Facilities/Amenities LOS** – Facility/amenity capacity in a ratio to the community's population and comparing against a standard or guideline. PP+D proposes to conduct Facilities/Amenities LOS for key facilities/ amenities that are benchmarkable.
- **Access LOS** – Travel distances (walk/ drive time) to parks based on park classifications as well as individual facilities such as playgrounds, ball fields, trails, natural areas, etc. per Park Planning District and citywide. The best Access LOS analysis uses the exiting roadway to determine access, rather than "as the crow flies" radii around facilities. We identify physical barriers, both man-made and natural, to provide a realistic access level service area. These barriers may include roads that while containing sidewalks may not be safe to cross due to a variety of factors that, through our experience, we have identified to be important in determining a streets' crossability.
- **Trust for Public Land ParkScore** – The 2025 TPL ParkScore is comprised of 5 elements each making up 20% of the total ParkScore - Acreage, Access, Amenities, Investment, and Equity. PP+D will break up and analyze the ParkScore. These findings will be useful during Phase 3 - Vision to inform potential recommendations.

- **Park Visitation LOS** – The PP+D will complete Visitation LOS Analysis for up to 18 parks identified by the LFUCG. The following data will be provided for these 18-parks:
 - **Visitor Heatmaps** - Visualize visitor activity concentrations within parks, identifying infrastructure needs, circulation patterns, and maintenance hotspots.
 - **Service Area Mapping** - Clearly delineate park user origins and define service areas to support equity analyses, targeted outreach, and grant applications.
 - **Demographic Visitor Profiles** - Combine visitor data with Census demographics to highlight who parks serve and identify underserved groups.
 - **Underserved Area Identification** - Identify service gaps by comparing visitation origins with residential data, guiding equitable park development and targeted programming.
 - **System-Wide Visitation Reporting** - Benchmark Park usage across selected parks to assess relative performance and prioritize investments.
 - **Time-of-Day and Day-of-Week Trends** - Optimize staffing, programming, maintenance, and safety protocols by uncovering detailed temporal visitation patterns.
 - **Average Visits per Device** - Track frequency of park visits, distinguishing casual visitors from regular users, guiding management and programming.
 - **Local vs. Nonlocal Use** - Differentiate local versus tourism-driven park visitation, informing targeted marketing and community engagement strategies.
- **Quality LOS** – **Representative** quality of facilities across the community based on the findings from the Site Evaluations. **Representative** scoring is identified per park, per Park Planning District, and citywide.
- **Funding LOS** – Parks and recreation operations and maintenance spending, capital spending, and total parks and recreation spending per park and non-park acre per Park Planning District and citywide.
- **Staffing LOS** - Staff in a ratio to the community's population (FTE's per 10,000).

PP+D will then benchmark LOS findings to NRPA Park Metrics and Trust for Public Land ParkScore standards. Additionally, PP+D will work with the City to identify up to five (5) agencies to benchmark - three (3) that are similar to the LFUCG and two (2) that are aspirational. This examination provides the LFUCG with data to use in considering adjustments that align with industry best practices. PP+D will produce a series of maps and tables that illustrate this data and analysis. Findings will be particularly important for tasks outlined in Phase 3-Vision and Phase 4-Implementation.

2.10. Needs + Priorities Assessment Summary Document: PP+D will compile all the information and data completed for Phase 2-Needs and Priorities Assessment and combine the findings with the findings from Phase 1-Context Analyses and develop a summary document. PP+D will develop a Power Point Presentation and Executive Summary that summarizes the findings from Phase 2 and combines it with the presentation from Phase 1. PP+D will submit the summary document, Executive Summary, and Power Point Presentation to the LFUCG for review and will make revisions per the LFUCG's written comments.

2.11. Findings Presentations: The PP+D Team will present the findings from the Phase 1-Context Analyses and Phase 2-Needs and Priorities Assessment in person to the following groups:

- The Executive Committee
- Lexington Parks and Recreation Staff
- Parks Advisory Board

PP+D will make revisions per written direction provided by the LFUCG.

2.12. One-on-One Interviews with Elected Officials: The PP+D Team has learned that taking the time to meet one-on-one with the elected officials in specific and key phases of the project, is critical to receiving final Mayor and City Council acceptance and approval of a plan. These one-on-one interviews encourage candid and invaluable input that help garner support for the project. PP+D will complete virtual one-on-one interviews with the elected officials to share with them the findings from Phase 1-Context Analysis and Phase 2-Needs and Priorities Assessment.

2.13. Mayor and City Council Presentation: PP+D has learned that presenting to the Mayor City Council at key points in the process is critical to receiving final approval of the plan. To that end, the PP+D Team proposes to share the findings from the Phase 1-Context Analyses and Phase 2-Needs and Priorities Assessment with Mayor and City Council.

Phase 2- Needs and Priorities Assessment Deliverables:

- **Phase 1 Context Analysis and Phase 2- Needs and Priorities Assessment Executive Summary (also formatted for website)**
- **Draft and Final Phase 2- Needs and Priorities Assessment Summary Document + Power Point Presentation**
 - **Summary of Stakeholder Engagement Methodology**
 - **Stakeholder Engagement Findings**
 - **Needs Assessment / Identifying Service Gaps and Access Needs**
- **Appendix with all data collected**

Part 1 Negotiated Scope Fee

Figure 1.1 – Fee Breakdown

Activity	Fee
Part 1	
• Phase 1 – Context Analysis	\$198,900
• Phase 2 – Needs and Priorities Assessment	\$243,600
Part 1 Total	\$442,500

See Parks and Recreation Master Plan Part 2 Negotiated Scope of Work for Phase 3 – Vision, Phase 4 – Implementation Strategy and Phase 5 Final Report and Approval