BOROUGH OF
LEWISBURG
PENNSYLVANIA

REQUEST FOR PROPOSALS

Borough of Lewisburg
Union County

STRATEGIC MANAGEMENT PLAN

CONTACT INFORMATION
Shannon Berkey, Community Development Grant Manager
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ISSUED: November 18, 2026

WRITTEN QUESTIONS DUE: December 11, 2026, 2:00pm

PROPOSALS DUE: December 18, 2026, 2:00pm

PROJECT STARTS: anticipate February 1, 2027

INTRODUCTION

Lewisburg Borough (.97 square miles), population approximately 5,300, is the Union County center of government and a commercial, cultural hub for the surrounding region. Lewisburg's 19th century downtown is on the National Register of Historic Places and is a vibrant 'River Town' in the Middle Susquehanna Region. Lewisburg Borough is located along the eastern center of Union County, approximately 30 miles south of Williamsport, Lycoming County and 60 miles north of Harrisburg, Dauphin County. Overall Lewisburg Borough has been classified as predominantly low-moderate income community, having diverse populations, while the entire Borough has an LMI determination of 54.20%. The borough area's extensive floodplain is a result of three local waterways. The West Branch of the Susquehanna River lies immediately east of Lewisburg Borough. Immediately to the west lies Bull Run, a tributary of the West Branch of the Susquehanna River. Finally, Buffalo Creek runs through the Borough from the northern boundary to the eastern boundary. Buffalo Creek is a 28-mile-long tributary of the West Branch of the Susquehanna River.

The Lewisburg community prioritizes and appreciates quality education and the arts and recognizes the important role that parks play in human health and residents' quality of life. Lewisburg's downtown bustles with a mix of restaurants, bookstores, retail shops, professional offices, and a small business incubator. The 9-mile-long Buffalo Valley Rail Trail (BVRT) stretches from Mifflinburg to the Borough, where a new trail crossing is being designed and constructed at State Route 15. Continued investments in recreational spaces provide economic benefits to downtown businesses and downtown property values, while achieving the quality-of-life families are seeking. A fundamental shift is occurring with more people of different ages and abilities and backgrounds now walking and riding, highlighting the need to create a safe pedestrian and bicycle-friendly borough.

The Borough operates under the council/manager form of government, providing the following municipal services: Regional Police; Paid & Volunteer Fire Services; Streets and Stormwater management; Recreational Parks and Event Venue; Refuse & Recycling; Flood Protection; and General Administrative Services. The Borough currently employs 15 full-time employees and 2 part-time employees.

The Borough is also party to the Buffalo Valley Recreation Authority, has a Shade Tree Commission, a Historic Architectural Review Board, and is supported by several locally based community revitalization non-profits including the Lewisburg Downtown Partnership, focused on the Central Business District along Market Street; Lewisburg Neighborhoods, addressing residential area concerns; and the CommUnity Zone, focused on inclusion, culture, and the arts. Along with collaboration with Bucknell University, these partnerships enhance the vibrancy of the Borough.

The Borough Council meets on the second and third Tuesday of every month at 6:30 p.m. at Borough Hall, 55 South Fifth Street, Lewisburg, PA. The Planning & Public Works Committee and the Finance and Public Safety Committee both meet monthly on the first Thursday and Friday of the month at 8:30am, respectively. Each committee is comprised of half of the elected council members. The Mayor is an ex-officio member of each committee.

The Borough is at the center of a school district that stretches five miles north and south and encompasses approximately 20,000 residents. It has municipal neighbors with similar populations (around 6,000) but spread out over much larger geographic areas: East Buffalo Township to the West and South, Buffalo Township just to the West, Kelly Township to the North, and across the river to the East, West Chilisquaque Township in Northumberland County.

PROPOSAL SUBMISSION (see additional information under Required proposal format)

1. Five (5) copies of the sealed proposal, as well as a CD/flash drive containing the proposal, must be submitted not later than the Date and Time stated on the title page of the Request for Proposal (RFP). The proposal items shall be submitted to:

   Borough of Lewisburg
   Attn: Shannon Berkey
   55 South Fifth Street
   Lewisburg, PA 17837

2. The envelope must be clearly marked on the outside "STRATEGIC MANAGEMENT PLAN PROPOSAL."

3. Proposal must be mailed, or hand delivered. No emailed or faxed proposals will be accepted.

4. Proposals will be handled confidentially by the Borough during the pre-award process.

5. Acceptance of a proposal and contract award shall be contingent upon the Borough's acceptance of the proposal.

6. The Borough will not be responsible for any expenses incurred by a Proposer in connection with this procurement.

7. All proposals shall be valid and binding for a period of 120 days.

8. QUESTIONS - Any questions concerning the RFP should be directed to Shannon Berkey, Community Development Grant Manager e-mail/sberkey@lewisburgborough.org or Office/570-523-3614 x314. Questions will be received until the Date and Time state on the title page of the RFP.

PURPOSE OF PROPOSAL

Lewisburg Borough seeks a qualified facilitator or municipal planning consultant to guide Borough Council, staff, and community participants through a focused strategic planning process and prepare a practical five-year Strategic Plan. The plan will establish a limited number of priorities, realistic actions, assigned responsibilities, indicative resource needs, and a simple method for annual progress review. The plan will also include a process for future updates of the original developed plan. This is a

strategic priority-setting engagement, not a comprehensive management, engineering, financial, or land-use planning study.

GENERAL CONDITIONS

A. No verbal instructions or verbal information to proposer (hereafter proposer or firm) will be binding on the Borough. These written specifications will be considered clear and complete unless written attention is called to any apparent discrepancies or incompleteness before the opening of the proposals. Should any alterations to these specifications be made in the form of written addenda, they will be emailed to all firms known to be in possession of the RFP. These addenda shall then be part of these specifications.

B. Submission of a proposal will be considered as conclusive evidence of the firm's complete examination and understanding of the specifications.

C. The Borough reserves the right to reject any or all proposals; the right to request additional information from any proposer; the right in its sole discretion, to accept the proposal considered most favorable; and the right to waive minor irregularities in the procedures or proposals if it is deemed in the best interest of the Borough.

   The Borough reserves the right to negotiate with proposers to establish variations from the original proposal(s), including proposed cost, which may be in the interest of the Borough.

D. The award will be made to the responsive and responsible firm whose proposal, conforming to specifications, will be most advantageous to the Borough. Price and other factors will be considered, such as delivery time, quality, service, experience and specific skills and disciplines represented on the consulting team, etc. The award may or may not be given to the consultant or firm with the lowest price proposal.

E. The Borough shall have the right, without voiding the contract, to amend the items or work covered by the specifications. In case such amendments are made, an equitable price adjustment shall be made between the Borough and the Firm. All adjustments in price shall be made in writing.

F. The firm will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or handicap. The firm will take affirmative action to ensure that applicants are employed without regard to race, color, religion, sex, age, handicap, or national origin. Firms will take steps to insure employees are treated during employment without regard to race, color, religion, sex, age, handicap, or nation origin. Such actions shall include but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoffs or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

G. The firm shall not initiate work or incur any cost until such time as the Borough executes an agreement with the firm, at which time the Borough shall issue a Notice to Proceed.

H. CONTRACT TERMINATION: A contract may be cancelled by the Borough by giving the firm a minimum of seven business days written notice.

I. INDEMNIFICATION: The firm shall hold the Borough harmless from and indemnify the Borough against any and all claims, demands and actions based upon or arising out of any activities performed by the firm and its employees and agents under this Contract and shall, at the request of the Borough, defend any and all actions brought against the Borough based upon any such claims or demands.

J. INSURANCE: The successful firm, prior to commencing work, shall provide at its expense the following insurance to the Borough, evidenced by Certificates of Insurance. Each certificate requires that notice be given thirty (30) days prior to cancellation or material change in the policies, to the Borough's representative.

<u>Workers' Compensation including Occupational Disease and Employer's Liability Insurance</u>

1. Statutory-amounts and coverage as required by Pennsylvania Workmen's Compensation and Occupational Disease Laws.

2. Employer's Liability – Bodily injury by:

    a. Accident $100,000 each
    b. Disease $500,000 minimum policy limit
    c. Disease $100,000 each employee

<u>Liability</u>

The successful firm shall maintain a commercial general liability insurance policy, using an occurrence form of coverage. The required coverage forms are:

1. Comprehensive

2. Premises – Operation

3. Contractual Insurance

4. Independent Firm

The Comprehensive General Liability Policy shall have a minimum limit of liability of $300,000 per occurrence.

Automobile liability coverage with minimum combined single limits of $300,000 per occurrence.

The successful firm shall obtain total minimum coverage limits of $1,000,000 per occurrence. The additional limits above the General Liability and Automobile Liability policies (required above) may be provided by Excess and/or Umbrella Liability policies.

All policies except Professional Liability shall name the Borough, its officers, agents, and employees as an additional insured. This coverage shall be reflected in the Certificates of Insurance.

Background and planning context

Lewisburg is the county seat of Union County, Pennsylvania, with approximately 5,300 residents. The Borough provides and coordinates municipal services and works with regional authorities, neighboring municipalities, Bucknell University, and community organizations. Existing Borough and regional plans, ongoing projects, and current municipal responsibilities will be the starting point for this work.

The plan should consider the full range of Borough responsibilities and community concerns, including municipal finance and administration; public safety; streets, sidewalks, stormwater and infrastructure; parks and recreation; housing; downtown and economic vitality; transportation and accessibility; environmental sustainability and flood mitigation; community engagement; and intergovernmental partnerships. Listing a topic does not authorize a separate technical study.

Required scope and deliverables

Task A — Kickoff and focused document review

- One in person kickoff meeting with designated Borough representatives to confirm schedule, decision points, and existing information to be provided.
- Review existing documents or summaries selected by the Borough, plus a concise list of current projects and known priorities. Prepare a 3–5 page findings/issue summary; identify overlaps and gaps without independently validating technical conclusions.

Task B — Community input

- Prepare one short community survey (approximately 10–15 questions) in an editable format. Publish, distribute, collect, and provide results to the borough.
- Facilitate in-person public workshop(s) (approximately 90–120 minutes), coordinated and advertised by the Borough. Consultant supplies agenda and materials; Borough supplies venue and logistical support.

- Summarize survey and workshop themes in approximately 2–3 pages. Survey responses are input, not a statistically representative public opinion poll.

Task C — Council and staff priority-setting

- Facilitate in-person (at minimum a half-day or as much as a full-day) Council/staff strategic planning workshop(s), using existing information and community input.
- Develop strategic priorities, with draft goals and a ranked or phased shortlist of feasible actions. Council retains all policies and priority-setting authority.

Task D — Draft and final strategic plan

- Prepare a concise plan, target 15–25 pages excluding appendices, with purpose, brief conditions summary, engagement findings, vision or guiding direction, priorities, actions, and implementation approach.
- Provide one draft for consolidated Borough comments and one final revision. Include one final presentation to Borough Council in-person. Council adoption remains at Council's discretion.

Task E — Implementation and monitoring tools

- Provide an editable implementation matrix with: priority, action, lead party, supporting partners, year/quarter or horizon, resource level (low/medium/high or preliminary range), funding/dependency notes, and measurable progress indicator.
- Provide a one-page annual review and budget-alignment checklist suitable for staff and Council use without further consultant assistance. Also include a process for future updates of the original developed plan.

Scope limits and Borough responsibilities

The base fee shall NOT include: independent fiscal audit or multi-year financial forecast; detailed staffing or organizational audit; engineering, traffic, GIS, housing market, or environmental studies; zoning ordinance drafting; capital project design; grant applications; statistical survey research; or implementation consulting after plan delivery. Such work, if later desired, will be procured separately.

Borough responsibilities: identify one project liaison; provide existing documents and available budget/capital summaries; assist with distribution of survey, provide public notice; arrange venues; coordinate participants; provide one consolidated set of draft comments as referenced in Task D; and arrange Council consideration. Consultant shall not assume responsibility for decisions or data controlled by other agencies.

Schedule and meetings

Target completion: within six months of notice to proceed. Proposed sequence: Month 1 kickoff/review; Month 2 survey; Month 3 public workshop and Council/staff workshop(s); Month 4

priorities and draft actions; Month 5 draft plan, Borough review and revisions; Month 6 final plan, matrix, and presentation.

Base scope includes one kickoff, one public workshop, one half-day to full-day Council/staff workshop(s), one final presentation, and up to three virtual coordination calls. Proposers shall include all travel costs in the fixed fee. Additional meetings require advance written authorization and are not part of the base scope.

Required proposal format

- Cover letter and designated project manager/contact (maximum 1 page).
- Approach and six-month schedule, explicitly mapped to Tasks A–E (maximum 3 pages).
- Names, roles, and brief qualifications of assigned personnel; two relevant municipal references (maximum 2 pages).
- Fixed, all-inclusive fee by task and total; proposed hours by role; explicit confirmation that the total does not exceed $30,000 (maximum 1 page).
- List of assumptions, requested Borough support, and any proposed deviations from the provided proposal (maximum 1 page).

Optional services, if any, must be separately priced and clearly excluded from the base fee. Proposals exceeding $30,000 for the required base scope will be deemed nonresponsive.

Selection criteria

Criterion	Points
Practical understanding of Lewisburg and appropriately limited scope	25
Quality and feasibility of facilitation, engagement, and implementation method	30
Relevant small-municipality experience and assigned personnel	20
Fixed fee, value, and transparency of staffing/assumptions	20
Schedule and responsiveness	5

Total: 100 points. The Borough may request clarification, interview shortlisted firms, reject any or all proposals, and negotiate within the stated scope, subject to applicable law and funding conditions. Lowest price alone will not determine selection.

Contract and administrative provisions

The selected consultant will enter into a written agreement with the Borough. Deliverables shall be supplied electronically as searchable PDF and editable Word/Excel or equivalent files. All costs, including travel and ordinary materials, must be included in the fixed fee. Proposed payment

milestones: 20% kickoff/review; 25% engagement; 25% draft plan; 30% final acceptance. No additional work may be billed without prior written Borough authorization.
Applicable insurance, indemnification, nondiscrimination, public records, ownership, termination, and other legal terms shall be included in the final solicitation or contract as reviewed by the Borough solicitor. Any grant-specific requirements must be confirmed before issuance; if grant terms require a more extensive Strategic Management Planning Program scope, this RFP must be revised accordingly.

Appendix A — Existing material to be made available

As available and selected by the Borough: current budget and capital information; current active /ongoing projects and Council priorities current and future; outstanding committee business, EIP Study, Bull Run Greenway Master Plan; Climate Action Plan; Wolfe Field Master Site Development Plan; Flood Mitigation Plan; Union County Comprehensive Plan; Union County Hazard Mitigation Plan; Shared Energy Report; Comprehensive Safety Action Plan; and relevant committee recommendations. The consultant is expected to synthesize, not redo, these plans.

Appendix B — Illustrative stakeholder categories

Borough Council and staff; Lewisburg Downtown Partnership; Lewisburg Neighborhoods; Lewisburg Arts Council; Bucknell University; Union County; neighboring municipalities; regional service partners; residents and businesses; and 3rd party contractors. Participation will be coordinated within the fixed workshop and survey scope, not through mandatory individual interviews.