



Request for Proposals for Community Survey for the City of Goleta

Release Date: February 22, 2018

Proposal Due Date: March 22, 2018

City of Goleta
Request for Proposals (RFP) for a Community Survey

The City of Goleta is requesting proposals from firms or individuals interested in conducting a Community Survey on behalf of the City. This document outlines the scope of work for consulting services. Five copies of the proposal shall be submitted in writing by 3 p.m. on March 22, 2018, to:

Deborah Lopez, City Clerk
Subject: Community Survey RFP
130 Cremona Drive, Suite B
Goleta, CA 93117

I. Introduction

The City of Goleta (City) is issuing this Request for Proposals (RFP) to identify qualified firms for the development and execution of a community satisfaction survey. The City seeks a firm that has specific experience in the preparation and implementation of polling for municipal governments. It is expected that the selected firm will prepare a community satisfaction survey that will help the City understand its strengths, areas for improvement and opportunities. The selected consultant will be one that has demonstrated experience in polling. This RFP was prepared to solicit responses from firms that desire to be considered for this important project.

II. Background

The City of Goleta is located on the Central Coast of California just north of Santa Barbara. Incorporated in 2002, the City has the warmth and charm of a small town. Beaches and well-maintained parks and open spaces add to its attraction. Contributing to this young community's outstanding quality of life are the City's low crime rate, mild coastal climate, and desirable location. Now in its 16th year, the City is interested in the community's satisfaction with the City, access to resources, and the community's thoughts about Council compensation and terms.

III. Contact Person

Questions regarding this RFP may be directed to:

Carmen Nichols, Deputy City Manager
City of Goleta
130 Cremona Drive, Suite B
Goleta, CA 93117
(805) 961-7507
cnichols@cityofgoleta.org

IV. Proposed Project Schedule

| | |
|-------------------------------------|-------------------|
| RFP Issued | February 22, 2018 |
| Deadline for Proposal submission | March 22, 2018 |
| Consultants selected for interviews | April 2, 2018 |
| Interviews conducted | April 23, 2018 |
| Consultant selected | May 1, 2018 |

V. Scope of Services

The Consultant's overall responsibility and scope of work is to develop and conduct a community phone [and online](#) survey [in English and Spanish](#) to assist the City in understanding the community's satisfaction with the City, access to resources, assessment of how to increase resident participation in government, and the community's thoughts about Council compensation and Mayoral length of term. The Consultant shall also:

- Attend up to three (3) meetings with City staff to develop the survey questions;
- Prepare and develop a presentation following the survey with an analysis of the results.
- Attend up to two (2) meetings with the City staff and/or Council to present the findings.

VI. Minimum Requirements

Minimum requirements for submittal of a Proposal in response to this RFP include the following:

- Demonstrated understanding of poll development and community surveying.
- Demonstrated experience, competence, and qualifications of the consultant and the participating staff successfully providing similar services to public entities.
- Understanding of the requested services and appropriateness of the proposed work program.
- Ability to perform the work in a timely manner, availability of staff and contingency plans.
- Limits of the firm's general liability, professional liability, and a copy of a valid insurance certificate and proof of adequate worker's compensation coverage for employees.

VII. Work Schedule

The consultant's work schedule will begin immediately upon contract award and is expected to continue until a final presentation on the results is made to the City Council. A proposed work schedule for the process should be submitted as part of the proposal.

VIII. RFP Proposal Submittal Requirements

Consultants interested in providing these services must prepare and submit a Proposal that includes:

Cover Letter: The cover letter is to be signed by an officer of the firm authorized to execute a contract with the City.

General Information: Information about the firm i.e. company, location of office(s), years in business, organization chart, number and position titles of staff.

Consultant Qualifications: This section shall describe the areas of expertise of current permanent staff and the scope of services that can be provided by the firm without the services of an outside consultant under the consultant's direction.

Key Personnel: Include a proposed project management structure. Identify the key contact for the project and all personnel who will be assigned to work on this project and include a description of

their abilities, qualifications and experience. Include resumes for all key individuals. There can be no change of key personnel once the proposal is submitted without the prior approval of the City.

Subcontractors: Identify any portion of the scope of work that will be subcontracted. Include firm qualifications (brief) and key personnel, telephone number and contact person for all subcontractors. The City reserves the right to approve or reject all consultants or internal staff performing consulting services, proposed by the consultant during or after the consultant review and selection process.

Project Workplan: A description of project understanding (brief), detailed work approach and methodology. The workplan should list specific tasks and any specific considerations, options or alternatives.

Project Schedule: Propose a timeline for completion of the survey including start date, milestones and target completion date. Any assumptions regarding turnaround time for City Council or City staff review should be clearly noted.

Fee information: A sealed fee estimate and compensation schedule. Provide a detailed fee proposal by task for the services identified in the scope of services section V of this RFP. Identify sub-tasks and the respective cost in your fee proposal as necessary. This section of your proposal shall include a professional fee schedule (hourly fee chart) for the consultant's personnel and the subcontractors' key personnel identified above who would be working on this project. Hourly fees for additional or optional services that may be required shall also be included.

Unless specified in the submittals, the professional fee schedule shall include any costs associated with complying with the City's insurance requirements. Identify the fee that will be charged for additional public or City Council meetings not identified in the scope of services provided here.

References: A list of projects completed by the proposer under which services similar to those required by this RFP were performed shall be listed in your proposal. An emphasis should be placed on projects undertaken within the past three years and those projects undertaken for public agencies located in similar sized communities in Santa Barbara County, California's Central Coast, and/or Southern California. Include a brief description of the services, dates the services were provided, and name and telephone number of references familiar with the services provided.

Work Samples: Provide brief descriptions of two previous survey projects including the materials presented to the staff and/or governing bodies as a result of the survey.

Agreement and Insurance Requirements: Limits of the firm's general liability and professional liability, and a copy of a valid insurance certificate and proof of adequate worker's compensation coverage for employees. Certificate, signed under penalty of perjury, regarding disclosure of financial interests of City officials or employees with the firm. A certificate of warranty regarding nondiscrimination by the firm and sub-consultants

Interview: Firms submitting a proposal may be interviewed by City Staff as part of the City's final selection process. The lead members of the consulting team will be expected to attend any interviews scheduled with the City.

Deadline and Delivery: Five (5) copies of the Proposal shall be submitted to the City of Goleta, 130 Cremona Drive, Suite B, Goleta, CA 93117 Attention: Deborah Lopez, City Clerk. The

deadline for submittal of a Proposal is March 22, 2018, at 3:00 p.m. No information submitted by facsimile or electronic mail will be accepted unless otherwise requested by the City during the proposal review process. Proposals received after 3:00 p.m. on March 22, 2018, will not be accepted.

IX. Review Process

Consultant selection will be based upon a qualitative review of the Proposals submitted. City staff may request additional clarifying information from any or all consultants that submit a Proposal during the review process. City staff will evaluate the responses to this RFP, and may interview the top-rated consultant(s). The firm selected for the project will be expected to enter into a Professional Services Agreement with the City, a sample of which is Attachment 1. It is anticipated that the City of Goleta and the selected firm will enter into a professional services contract for the time period beginning May 2018 through project completion.

X. General Terms and Conditions

The City reserves the right to reject any and all Proposals.

The City will not be responsible for any costs incurred by respondents in the preparation and submittal of a response to this Request for Proposals. The **Deputy City Manager will make a recommendation to the City Manager to** award the agreement based upon the City's standard professional services agreement. If the amount is above the City Manager's authority, then the agreement will go to the City Council who will approve and award the agreement.

The City reserves the right to modify the scope of the project for this project at any time.

Reports, Documents, graphs, charts, data, drawings and findings (regardless of format) that are associated with this project shall be the property of the City.

Fee proposals included with the submitted Proposal shall remain effective for 120 days beyond the submitted date.

Consultant agreement will be the City's standard Professional Services Agreement. This agreement contains the City's insurance requirements that must be met prior to execution of the agreement.