



**REQUEST FOR PROPOSALS (RFP) FOR**

**ECONOMIC DEVELOPMENT**

**STRATEGIC PLAN**

**March 9, 2020**

Submit Proposals/Qualifications to:

City of Goleta  
Neighborhood Services & Public Safety Department  
Attn: Dominique Samario, Management Analyst  
130 Cremona Drive, Ste. B  
Goleta, CA 93117  
(805) 690-5126

**Due by 3:00 p.m.**  
**Tuesday, April 7, 2020**

## INTRODUCTION

The City of Goleta (City) is issuing this Request for Proposals (RFP). The City seeks to retain the services of a consulting firm, or firms working in partnership, to carry out a comprehensive analysis building on its 2009 Economic Development Strategic Plan (EDSP). This effort will require close coordination with the City of Goleta and other community special interest groups.

The main objectives of this process are to craft a new EDSP with economic development goals, strategies, implementation steps (tactics), and indicators of success (metrics) that reflect the vast differences in the economic environment as well as the City itself since the initial EDSP was issued in 2009. In addition, the Plan should provide a holistic view of economic development including, but not limited to, the roles of art, resource scarcity, changes in the retail landscape, eco-tourism, outdoor activity and wellness, the impacts of affordable and accessible childcare or lack thereof, and the many ways “live, work, play” comes to fruition in Goleta.

The City seeks an economic development firm that has specific experience in the preparation and implementation of economic development strategic plans. The City desires the EDSP to also contain an Implementation Plan, outlining the timing, anticipated cost and funding source of each Implementation Action. The selected consultant will be one that has demonstrated experience in preparation of municipal economic development strategic plans.

### Background

Incorporated on February 1, 2002, the City of Goleta is located along the Highway 101 corridor in southern Santa Barbara County neighboring the City of Santa Barbara and the University of California, Santa Barbara. With a current population of approximately 30,000, Goleta is the fourth largest city in the County. The City’s Adopted General Plan allows for a build out population of approximately 38,100 by the year 2030.

In fall of 2009, the City adopted its first Economic Development Strategic Plan. This document’s main purpose was to articulate goals, objectives, and implementation measures to support a thriving economy within the City of Goleta. It also includes relevant background information on Goleta’s demographics, community structure, and employment in both the City and Santa Barbara County. Goleta’s EDSP is a results-oriented document that contains seven goals each supported by a series of strategies and implementation actions.

While the EDSP has served the City well over the past 10 years, the ever-changing nature of the economy, coupled with a city that has grown from newly incorporated to a more fully established community and agency, necessitates a thorough analysis. The City of Goleta has taken many steps since the initial EDSP to establish itself as a unique community along the Central Coast, including establishing a New Zoning Ordinance, and the new EDSP should reflect goals unique to the Goleta community including quality of life and environmental sustainability that the City of Goleta values.

**Available Resources**

The following data and documents are readily available for reference and are required to inform the EDSP:

- City of Goleta General Plan/Coastal Land Use Plan (2006)
- City of Goleta Economic Development Strategic Plan (2009)
- City of Goleta Strategic Energy Plan (2019)
- 2019 - 2023 Capital Improvement Project Listing/City Budget Documents
- 2019 - 2021 Strategic Plan
- City of Goleta New Zoning Ordinance (2020)

**SCOPE OF WORK/PROJECT DESCRIPTION**

The City of Goleta is requesting Proposals to create a new Economic Development Strategic Plan (EDSP) performing a comprehensive revision of the 2009 Economic Development Strategic Plan. Community engagement will be a critical component, seeking the input of residents, stakeholders, staff, and consultant expertise in order to produce an EDSPU containing goals, objectives, implementation plans, and metrics. The Consultant will also provide meeting facilitation services, supporting materials and research, and an engaging report structure, including graphics and visual elements helpful for understanding and implementing the Plan.

The Consultant shall provide professional services to support the following tasks:

**Review of Current Economic Development Strategic Plan**

- Review and evaluate all sections in current EDSP (Sections I through X and appendices) to include its progress and effectiveness.
- Provide justification for any sections being recommended for addition or removal.

**Funding**

- Review necessary funding for EDSP implementation, including revenue sources and projected expenditures.
- Prepare a comprehensive City of Goleta economic development forecast based on economic trends and financial modeling.

**Demographics**

- Review and analysis of existing demographic and socioeconomic data, labor force characteristics, sales tax revenue, and other key economic data.
- Update key demographic trends and forecasts, social factors, economic factors, and financial indicators included in EDSP.

**Tourism and Marketing Analysis**

- Analyze existing tourism-related attractions and events to provide an estimated economic impact and recommend prioritization of City support in reference to economic development goals. Recommendations may include development of cultural asset map, among other concepts, to fully capitalize on established community attractions.

### **Community Services Analysis**

- Identify community needs, assets, and priority investments.
- Perform analysis to determine impacts—both positive and negative—of Economic Development on community vitality, including but not limited to, job retention, childcare, and elements related to individual neighborhoods and/or communities.

### **Goals and Strategy**

- Establish economic development strategy, goals, and objectives, which include significant milestones and are specific, measurable, attainable, relevant, and time-bound (SMART).

### **Action Plan/Tactics**

- Revise the economic development action plan including suggested activities, projects, and programs to implement objectives and goals set forth in the strategy.
- Offer guidance on how City might pursue the following goals:
  - Support new business start-up, retention, and expansion, especially for small businesses and entrepreneurs and emerging companies from underserved communities.
  - Enable events that attract vendors and tourists, particularly for the neighborhoods that can benefit most from the support.
  - Enhance awareness of the importance of shopping locally to support businesses in Goleta; enhance Old Town Goleta's sense of place.
  - Support the local workforce with job training and related skills.
  - Create attractions for the city that might both increase visitors and provide benefits to residents.
  - Provide targeted assistance so as to help the vulnerable and marginal from falling into homelessness and other miscellaneous services that benefit individuals or communities in need.

### **Performance Measures/Metrics**

- Update performance measures with timelines that will be used to evaluate whether and to what extent plan goals and objectives have been or are being met.

### **Appendices**

- Provide detailed information on various components of the document.
- Identify any necessary studies to support implementation of EDSPU.

### **Meeting Attendance**

- Attendance at a minimum of two (2) meetings and/or workshops with the Goleta City Council.
- Preparation and facilitation of community visioning workshop(s) with the business community, general community members, Chamber of Commerce, and other stakeholders.

## **APPROVAL PROCESS**

The EDSPU will be reviewed by the Economic Development and Revitalization Standing Committee and the Goleta City Council, who will consider recommendations and approve the EDSPU.

The consultant team must be available to participate and present in meetings with staff and at public forums. The Proposal cost estimate should at least include the anticipated meetings listed below. The consultant shall carefully consider the amount and level of consultant team members needed to be present at each.

- Two (2) initial scoping meetings
- At least two (2) public workshops\*
- At least three (3) all hands project management team meetings\*
- Two (2) Economic Development and Revitalization Standing Committee and/or other City meetings
- Two (2) City Council meetings

*\*It is suggested to include a contingency plan to cover additional needed meetings*

## **PROJECT MANAGEMENT/ADMINISTRATION**

The consultant will work under the direction of the City of Goleta Neighborhood Services & Public Safety Department. The City's project manager assigned to the project will coordinate with the consultant, Department staff, and Committees/Council. The City's project manager will assist the consultant by providing direction, data, logistical, and other support as needed to facilitate performance of the Scope of Work.

The consultant shall be required to provide all services and work to complete the required documents and all other work described herein. The Proposal should include a step-by-step breakdown of tasks to be performed on a milestone and product-by-product basis. The consultant should include in the Proposal a timeline and schedule for the submission of draft products to City staff for review at various stages of completion. In addition, any tasks assumed to be accomplished by City staff and the general level of participation expected from the City should be specified.

The consultant's project manager will oversee all consultant activities from project initiation to conclusion and management of all sub-providers. This task includes activities such as project start-up, minutes, agendas, budget and schedule tracking,

ongoing coordination with consultant team, and providing daily point of contact with the City.

The task entails attending collaborative meetings with the City at key milestones in the planning process such as coordination of public participation activities, development of key products and materials and review of analysis and findings. Project management/administration costs shall not exceed 10 percent and project teams shall be prepared with consideration for an appropriate hierarchy to maintain effective project administration and communication.

## **SUMMARY OF DELIVERABLES**

The consultant shall produce deliverables related to the scope of work provided herein. Deliverables shall include, but are not limited to, the following:

- Scoping meeting agenda, meeting notes, minutes, presentation, other meeting materials
- Project meeting agendas, meeting notes, minutes, presentations, other meeting materials
- Public workshop agendas, meeting notes, minutes, presentation, other meeting materials,
- Economic Development Strategic Plan Outline
- Economic Development Strategic Plan Draft(s) (including sections I – X)
- Economic Development Strategic Plan Final Draft and Appendices
- Funding and implementation strategies for the financial plan(s)
- Public outreach materials
- Charts and graphics required for effectively relaying information to staff and community
- Microsoft excel tools, with built in formulas to model financial scenarios/decisions
- Resources such as charts and/or matrices for staff to utilize for implementation of the plan (i.e. timelines)
- Monthly invoices and status reports to City
  - All invoices will include the following: project accomplishments to date, upcoming project tasks, and issues log

The City will work with the selected consultant to refine the scope of work as is appropriate to complete the objectives of the assessment.

Regardless of previous invoices and payments, the City will retain 10% of total contract amount until the final draft has been presented to and approved by City Council.

### **I. Proposal Submittal Requirements**

Consultants shall submit a proposal limited to a maximum of twelve (12) double-sided pages exclusive of cover letter, resumes, and references. The proposal

shall be organized in the following format and shall include the information in the below outline:

**A. Cover Letter**

The cover letter must be signed by an officer of the firm authorized to execute a contract with the City. The primary contact should be identified and phone number, email, and mailing addresses provided.

**B. General Qualifications**

The consultant shall provide a summary of the consultant's qualifications, general information about the firm, location of office(s), years in business and areas of expertise. The consultant shall provide a brief description of projects that involved a similar scope of services.

**C. Key Staff**

The consultant shall identify key staff and include a description of their abilities, qualifications, and experience. Attach resumes of key staff that will be assigned to this project. Include a proposed project management structure and organizational chart. Identify any portion of the scope of work that would be subcontracted. Include firm qualifications (brief) and key personnel, telephone number, email address and contact person for all subcontractors. The City reserves the right to approve or reject all consultants, internal staff performing consulting services, or subconsultants proposed by the consultant.

**D. Project Workplan**

Consultant shall describe its understanding of the project, detailed work approach, and methodology. Consultant shall expand on the scope of work if appropriate to accomplish the overall objective of the project, and provide suggestions which might enhance the results or usefulness of the study. Include assumptions about the number of meetings needed with City staff and other stakeholders to complete the Scope of Work. Consultant shall provide an example of a similar study prepared by the firm or proposed team. Consultant shall also include a schedule of work.

**E. References**

Consultant shall provide a list of references for the firm and any subconsultants, including the names, addresses, email addresses, and telephone numbers of recent clients, preferably other public agencies for which consultant has done similar work. Include a list of specific projects associated with each reference, date work was performed, cost, and key personnel involved.

**F. Budget**

The cost proposal shall include all labor costs, overhead costs, subconsultant costs, and an itemized list for direct expenses. Costs must be shown in a

matrix format, by task grouping, and show hours per staff member, base labor rates, overhead, and profit rates.

**G. Disadvantaged Business Enterprises (DBE's)**

Consultant shall make a good-faith effort to include certified DBE firms as sub-consultants. If no DBE firm will be utilized, the consultant's proposal shall describe the good-faith efforts that were taken in an attempt to include a certified DBE for completion of one or more tasks associated with the scope of work.

**H. Insurance**

Consultant shall submit a copy of their existing commercial liability insurance detailing their current level of coverage. Be advised that the selected consultant shall be required to provide the following insurance coverage prior to the City issuing a Notice to Proceed:

Commercial general liability at least as broad as	
ISO CG 0001 (per occurrence) .....	1,000,000
(General aggregate).....	2,000,000
Commercial auto liability at least as broad as	
ISO CA 0001 (per accident) .....	1,000,000
Errors and omissions liability (per claim and aggregate)	1,000,000
Workers' compensation statutory	

**II. Consultant Selection Process**

The basic elements of the Consultant selection process are as follows:

**A. Evaluation of Submittals.**

The proposals will be evaluated and ranked by the City. The selection will be made directly from the qualified list. Proposals will be evaluated on various qualifications, including but not necessarily limited to the following:

- Knowledge and experience of key staff
- Availability of key staff personnel and resources
- Experience and demonstrated competence on similar projects
- Understanding of project scope
- Cost

The City will notify all consultants that submit proposals of the evaluation results upon award of the contract. Top ranked firms will be invited to an interview with City staff.

Selected firm will enter into agreement with the City based on the attached agreement template (Attachment 1).

**III. General Information**

**1. Proposal Submission**

Consultant shall submit four (4) copies of their proposal to the City; (1) copy should be an unbound, reproducible copy. Proposals shall be received no later than **3:00p.m. on Tuesday, April 7, 2020**, at the following address:

*City of Goleta  
Neighborhood Services & Public Safety Department  
Attn: Dominique Samario, Management Analyst  
130 Cremona Drive, Ste. B  
Goleta, CA 93117*

Late submittals will be rejected and returned.

**A. Proposed Project Schedule**

The following proposed schedule is subject to change:

RFP Issued	March 9, 2020
Deadline for Proposal Submission	April 7, 2020
Consultants selected for Interviews	April 16, 2020
Interviews Conducted	April 30, 2020
City Council Award of Contract	June 2, 2020
Presentation of Draft Report to Economic Development And Revitalization Standing Committee	November 2020
Presentation of Final Report to City Council	February 2021

**C. Proposal/Qualifications Property**

All submitted Proposals/Qualifications become the property of the City upon submission.

**D. Non-Commitment of the City**

This RFP/Q does not commit the City to select a consultant, to pay any costs incurred in the preparation of a proposal for this request, or to produce or contract for services. The City reserves the right to accept or reject any or all proposals received as a result of this request, or to modify or cancel in part or in its entirety the RFP/Q if the City determines it is in the best interest of the City to do so.

**E. Inquiries**

Inquiries concerning this RFP should be directed by email only to:

Dominique Samario, Management Analyst  
Email: [dsamario@cityofgoleta.org](mailto:dsamario@cityofgoleta.org)

**Note: The City reserves the right to amend the RFP/Q by Addendum.**