

**RODEO HERCULES FIRE PROTECTION DISTRICT
REQUEST FOR PROPOSALS (RFP)
Strategic Planning Services
(DRAFT)**

I. DISTRICT BACKGROUND

The Rodeo Hercules Fire Protection District (“RHFPD” or “District”) is an independent fire protection district located in western Contra Costa County. The District is approximately thirty-two (32) square miles, and includes the City of Hercules and the unincorporated area of Rodeo. The population of the District is approximately 35,000, with population expected to continue increasing due to new residential development in the City of Hercules. The District contains a major oil refinery (Phillips 66), numerous underground fuel pipelines, two major rail lines, and the I-80 Freeway.

District staff consists of a Fire Chief, a Battalion Chief, six captains, six engineers, one part-time fire inspector, one full time administrative services officer, and one part-time administrative assistant. The District responds to approximately 2,600 calls annually, providing fire suppression and medical emergency response services. Advanced life support and paramedic services are provided within the District by American Medical Response under a regional ambulance contract. The District has 2 active fire stations, one located each in the City of Hercules and the unincorporated area of Rodeo. RHFPD operates within Battalion 7, a jointly operated Battalion with the City of Pinole Fire Department and the Contra Costa County Fire Protection District.

The District has an annual budget of approximately \$7.9 million. Principal sources of funding for the District are property taxes, a benefit assessment, and a parcel tax enacted by the voters of the District in 2016 (commonly known as Measure O).

The District is governed by an elected five member board of directors. The Fire Chief is the chief executive of the District.

II. PROJECT SCOPE OF WORK

The RHFPD is requesting proposals from qualified firms (“Proposers”) to develop a strategic plan to guide (a) future service expansions and improvements and (b) organizational improvements, including establishment of priorities and timeframes, pricing of potential improvements and development of revenue options to fund expansions and improvements. The selected Proposer will be expected to engage the community and collect stakeholder and Board of Directors input as part of the planning process.

A more complete Sample Scope of Services has been attached to this Request for Proposals(RFP) as Attachment 1.

III. PROPOSALS

A. Proposal Submission

The District must receive from Proposers five (5) printed copies of their proposals, as well as an electronic version on a USB flash drive, no later than **5 p.m. (Pacific Time)** on [REDACTED], addressed to:

Bryan Craig, Fire Chief
Rodeo Hercules Fire Protection District
1680 Refugio Valley Road
Hercules, CA 94547

The RHFPD will not pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract.

During the evaluation process, the RHFPD reserves the right to request additional information or clarification from Proposers, and to waive any and all immaterial informalities and irregularities. At the discretion of the RHFPD, firms submitting proposals may be requested to make oral presentations as part of the evaluation process. Once submitted, the proposals will be the property of the District.

Submission of a proposal shall constitute a firm offer to the RHFPD for 90 days from the date proposals are due to the District. By submitting the proposal, it is expected that the Proposer has carefully read and fully understands this RFP (including the Attachments). A Proposer may withdraw its proposal at any time before the submittal deadline by delivering a written request for withdrawal signed by, or on behalf of, the Proposer.

B. Subcontracting

RHFPD will accept proposals from individual firms or consultant teams. Any proposal submitted on behalf of multiple consultants must designate a "lead" consultant/firm to enter into a contract with the District. The lead consultant will be solely responsible for contractual performance and management of all subconsultant relationships. Any secondary consultant/firm would be a subconsultant to the lead consultant.

All proposals must disclose and describe the use of any subconsultants (except those performing copying and/or printing services) and include the specific scope of work proposed to be performed under subcontract(s). RHFPD reserves the right to reject any proposed subconsultant as part of the RFP and contract negotiation process.

C. Agreement Form

The District will utilize the agreement included as Attachment 2 for the project. Except as specified in the proposal, submission of a proposal constitutes acceptance of the agreement format and provisions included in Attachment 2.

D. Contact Information; Requests for Clarifications

All requests for clarifications, questions, or other communications about this RFP shall be made in writing via e-mail, or U.S. Mail, for receipt by the District no later than **5 p.m. (Pacific Time) on [redacted]**. Address all communications to the person listed below. To ensure that requests for clarifications and questions are received and answered in a timely manner, e-mail correspondence is preferred. Responses will be summarized and distributed by e-mail and website FAQ without identifying the original source of the question. Firms should rely only on written statements issued by the person named below:

Bryan Craig, Fire Chief
Rodeo Hercules Fire Protection District
1680 Refugio Valley Road
Hercules, CA 94547
510-799-4561
craig@rhfd.org

E. RFP Schedule

The RHFPD reserves the right to amend the RFP schedule as necessary:

RFP Issued	
Deadline For Submitting Written Questions	
Deadline for Receipt of Proposals	
Finalist Interviews (if scheduled)	
Board of Directors Approval/Contract Award	

F. Proposal Content

In order to be considered for selection for award of contract, the Proposer must demonstrate the ability to perform the scope of services. Proposals must include information on relevant experience, key staff members and their qualifications and, where relevant, familiarity with the RHFPD's services, service area, demographics, constituencies, finances and challenges.

Each proposal must include:

1. Introduction of the proposed Consultant team indicating the Proposer's agreement to be bound to its proposal for 90 days.
2. Confirmation that the Proposer is prepared to sign the standard agreement included in sample form as Attachment 2 if a contract is awarded, or

identification of any exceptions, changes or revisions requested relative to any element of the standard agreement.

3. Information on the “lead” consultant/firm and any proposed subconsulting firms including: firm name, contact name, business address, telephone number, e-mail address, type of entity (individual, partnership or corporation), years in business.
4. Information on proposed firm(s) and on key personnel including: names, proposed roles for this project, and relevant experience. Complete resumes may be attached.
5. Contact names and phone numbers for at least three public agency references for which the Proposer has performed a similar engagement within the previous three to five years. Contact names and phone numbers for at least three public agency references for which each proposed subconsultant has performed a similar engagement within the previous three to five years. Please include a brief description of the project, key consultant personnel involved, the project cost and time expended, and the date of completion. Please also include a summary of the outcome(s).
6. A well-conceived work plan and schedule indicating timelines for deliverables, critical meetings, and the completion of each task.

The work plan and schedule should include a full description of all major tasks and subtasks. Attachment 1 – Sample Scope of Services is provided as a baseline, to which Proposers may make recommended changes to their responses.

7. A detailed cost proposal for services based on the associated requirements detailed in this RFP. The cost proposals should include a total-not-to-exceed amount and a proposed payment schedule. Included in the fee shall be all labor, travel expenses, profit, administrative and overhead fees, and other direct costs, including the cost of obtaining insurance, as required in the Agreement. The cost proposal also should include an estimate for the number of hours that will be required of Proposer's personnel/staff members/subconsultants to accomplish the work. Proposers also must submit their hourly rate schedule for all personnel who may be involved in the work. Flexible cost proposals identifying potential options (i.e. different forms or quantities of stakeholder and/or public engagement) are encouraged. Proposers also must submit their policies on cost reimbursement and describe their customary billing procedures, including any terms of payments with any discounts allowed.
8. Verification of Proposer's ability to act as an independent consultant. If there is a relationship to work performed for other entities which may present a

conflict of interest, or the appearance of such a conflict, it should be fully disclosed as it relates to the proposed scope of work.

G. Confidentiality

The California Public Records Act (Cal. Govt. Code Sections 6250 et seq.) mandates public access to government records. Therefore, unless the information is exempt from disclosure by law, the proposals and any written communications between the District and a Proposer will be subject to disclosure to the public upon request.

If a Proposer believes any record or information they submit contains trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer's competitive position if disclosed, the Proposer shall request that the RHFPD withhold from disclosure the proprietary information by marking each page containing such proprietary information as confidential. By submitting a proposal with portions marked "confidential," a Proposer represents it has determined such portions qualify for exemption from disclosure under the California Public Records Act. Proposer may not designate its entire Proposal nor its cost proposal as confidential. The District has the ultimate authority to determine whether or not a record is exempt from disclosure.

If a Proposer does not request that the RHFPD withhold from disclosure information identified as confidential, the RHFPD will have no obligation to withhold the information from disclosure and may release the information sought without any liability to the RHFPD.

H. Review and Selection Process

The RHFPD reserves the right to select a Proposer based on the RHFPD's sole discretion. Proposals will be evaluated in response to this RFP and based on the needs of the RHFPD in accordance with the following criteria:

- i. Quality and completeness of the proposal;
- ii. Proposer's qualifications and relevant experience, including the experience of the firm and staff assigned to the project;
- iii. Measurable success with projects/engagements of similar scope and complexity, including as demonstrated by references from at least three other clients;
- iv. Proposer's ability to schedule and efficiently perform the work;
- v. Proposer's prior record of performance with the RHFPD or other public agencies;

- vi. Proposer's knowledge and familiarity with the demographics, constituencies and relevant stakeholders in the RHFPD's service area;
- vii. Proposer's knowledge of financial challenges and funding sources that are pertinent to fire districts; and
- viii. Reasonableness of cost proposal.

One or more Proposers may be invited to participate in an interview process. The RHFPD requests that Proposers make themselves available if asked to participate in an interview. If an interview is requested, the Proposer will be responsible for all costs related to the interview (travel, meals, lodging, etc.).

I. Revised Proposals, Discussions, Negotiations, Best And Final Offers

The RHFPD may request revised proposals, enter into discussions and/or negotiations with one or more of the Proposers and/or request "best and final offers." The RHFPD also may award a contract without conducting any negotiations, discussions or interviews.

J. Contract Award

The District's Board of Directors will select the Proposer to award the contract. All proposers will be notified of the final award in writing.

This RFP does not commit the RHFPD to award a contract. The RHFPD reserves the right to waive informalities and irregularities in the Proposals received or in the procedures outlined herein, to accept or reject any or all Proposals, or to modify or cancel the RFP in part or in its entirety.

K. Budget and Compensation

Following execution of a contract with the successful Proposer, the RHFPD and the selected Proposer will finalize the work plans and associated costs before the selected Proposer commences work on same.

ATTACHMENT 1

SAMPLE SCOPE OF SERVICES: STRATEGIC PLAN FOR THE RODEO HERCULES FIRE PROTECTION DISTRICT

The Rodeo Hercules Fire Protection District seeks to develop and adopt a strategic plan to guide (a) future service expansions/improvements and (b) improvements to the District's organizational effectiveness, including a plan to fund expansions and improvements. The strategic plan should provide the District with short-term and long-term direction based on the District's vision, goals and objectives updated or developed through the planning process; an honest assessment of the District's strengths and weaknesses; and Board of Directors, staff, and community priorities. The plan should optimize available District resources and create a roadmap for securing and utilizing potential future resources. The plan should build upon – rather than duplicate or replace – prior District planning efforts.

Work must include (but may not be limited to):

- **Mission, vision and goals:** Update the District's mission, vision, and goals
- **Community Engagement:** Develop and implement a community engagement strategy for the strategic planning effort, including focused stakeholder input and broader community input
- **Information Gathering and Documentation:** Gather and document information including at least:
 - Community and Board of Directors impressions of the District generally, what services the District should provide, and priorities for service expansions/improvements
 - Stakeholder perceptions on benefits and priorities for potential service expansions/improvements, which may include:
 - a. Refurbishment of Existing and Construction of new stations
 - b. Increased training opportunities for staff and the community (including potential future staff), including through cooperation with existing educational programs in the region
 - c. [add additional examples]
 - Strengths and weaknesses of the District organization, and opportunities for organizational improvements

- **Financial Analysis:** Conduct financial analysis including at least:
 - Financial analysis of costs of each potential service expansion/improvement and each potential organizational improvement (including a plan for periodically updating this analysis)
 - Revenue enhancement options to fund services expansions/improvements and organizational improvements
- **Funding Analysis:** Determine stakeholder priorities for pursuit of revenue enhancements and examine related effects on prioritization of service expansions/improvements
- **Strategic Plan:** Develop a plan, using the information and analysis above, to:
 - Define and apply criteria to select and prioritize a subset of potential (a) service expansions/improvements and (b) organizational improvements
 - For each selected and prioritized improvement:
 - Establish realistic goals and objectives (including timing for implementation)
 - Determine strategic initiatives associated with each selected/prioritized improvement
 - Identify tasks required for successful implementation of each strategic initiative for each selected/prioritized improvement, and develop timeframes/guidelines for accomplishment of each task
 - Develop a plan to guide District efforts to secure organizational and community commitment to implementing the plan and funding the selected improvements

**ATTACHMENT 2
SAMPLE AGREEMENT**

District's consulting services agreement

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