



DATE: June 27, 2012

TO: Honorable Mayor and City Councilmembers

FROM: City Manager's Office

SUBJECT: **AUTHORIZATION TO ISSUE A REQUEST FOR PROPOSALS (RFP)
FOR FACILITATORS TO DEVELOP A STRATEGIC PLAN/GOAL
SETTING EFFORT WITH THE CITY COUNCIL**

SYNOPSIS

Staff recommends that the City Council authorize the issuance of a Request for Proposal to develop a Strategic Plan/Goal Setting effort with the Oceanside City Council and, if desired, the Council may appoint a Council ad hoc committee to recommend a facilitator for full Council Consideration.

BACKGROUND

In January 2012, the City Council hosted a workshop to discuss citywide goals and objectives. As part of the discussion during the workshop, the City Council directed the initiation of a strategic planning effort in advance of the FY 2013-14 budget process. The most recent facilitated effort for Council goal setting took place in September 2009; a summary of that effort is provided in Attachment A. Since 2009 staff, at the Council's direction, has updated the City Council's strategic goals and objectives. The current summary of that effort is provided in Attachment B.

ANALYSIS

In order to create a facilitated City Council Strategic Plan/Goal-Setting Effort, staff is recommending issuing an RFP for facilitators interested in working with the City Council so that the Council can collectively select a facilitator to work with in this effort. Interested facilitators will be asked to submit a response to the RFP, which is provided in Attachment C. The RFP will be advertised, posted to the City's Website, and sent to a list of known facilitators, upon Council's approval. There will be an approximately 30-day period in which the facilitators can submit a proposal in response to the RFP, which will include such items as:

- A cover letter summarizing the key elements of a facilitation plan for the City Council.
- Evidence of relevant experience in developing strategic plans/goals and objectives with elected officials.

- Five references of City Council or County Boards of Supervisors whose requirements are comparable in scope and complexity to the City of Oceanside.

Staff is providing the following options for the Council's consideration:

Option 1

Staff will evaluate the RFP proposals to determine completeness. Representatives of the RFPs that are deemed by staff to be complete will be asked to make a presentation to the City Council at a Workshop. The City Council will then select one of the facilitators to enter into a professional services agreement to provide Strategic Planning/Goal-Setting Services.

Option 2

City Council to appoint an ad hoc committee to review proposals, interview as needed and make a recommendation to the entire City Council.

FISCAL IMPACT

Release of the RFP has no fiscal impact to the General Fund. However, once a facilitator is selected, Council will need to approve the professional services agreement which will contain appropriate costs.

INSURANCE REQUIREMENTS

Does not apply.

COMMISSION OR COMMITTEE REPORT

Does not apply.

CITY ATTORNEY'S ANALYSIS

Does not apply.

RECOMMENDATION

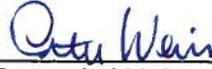
Staff recommends that the City Council authorize the issuance of a Request for Proposal to develop a Strategic Plan/Goal Setting effort with the Oceanside City Council and, if desired, the Council may appoint a Council ad hoc committee to recommend a facilitator for full Council Consideration.

PREPARED BY:



Michelle Skaggs Lawrence
Deputy City Manager

SUBMITTED BY:



Peter A. Weiss
City Manager

ATTACHMENTS

- Attachment A – 2009 Goal Setting Summary
- Attachment B – Citywide Goals and Priorities
- Attachment C – RFP



City of Oceanside

City Council Goal Setting Meeting

Summary of Ideas

Facilitated by:
Jeff VanderWielen, Ph.D.

The CENTRE for Organization Effectiveness

January 15, 2009

Overview

On January 15, 2009, the Oceanside City Council convened a high-level goal setting meeting to share and discuss long range planning issues for the City. The council engaged in an open discussion to address the question, "Given the growth projections that show the City of Oceanside will grow to a population of 220k people by the year 2030, what will the City will look like 15-20 years out; what do you think are important issues that we need to consider as we plan for growth? The goal of the meeting was to share and discuss ideas. The goal was NOT to set priorities, come to agreement on issues or solutions, to plan details or next steps.

Within the context of looking ahead 15-20 years, six broad topic areas were posted for discussion:

- Housing
- Water
- Energy
- Land use
- Growth Management
- Transportation

The ideas and opinions of the council were recorded on chart paper. This document represents a transcription of the information charted during the discussion. The information is presented by topic area.

Housing

- Affordable housing
- Diversity of housing to meet the needs of every economic level
- Consider – should we pull in more of the higher income groups?
- We need to ask the public, what direction do you want to go? How diverse do you want us to be?
- Need to think through the implications for zoning, streets, etc.
- Density in-fill projects – Need to ask, what does the neighborhood want?
- We have opportunities in some of the corridors
- Sustainability of housing – after the 9th year in their home, homeowners then become net user of services. How do we pay for housing with increased housing or existing houses?
- Residential and hospitality will drive development in the coast highway corridor
- SANDAG Smart Growth Plan will drive our planning
 - Transportation corridor
 - Mixed use and increased density
- We have a large transient society – would like to know the numbers – how many people, what demographics, flow in and out of Oceanside?
- First time home buyers do not come here/ 50 years plus are coming. They are not looking for big houses and want to be near the beach because of the rail system, and will not need to use their car
- What is the change of incoming demographics?
 - Beach areas
 - Other areas

Water

- Do we want to be 50% water independent by the year 2030? This seems to be an attainable goal. Or do we need a different target? We agree that we need to have a target, but need more information before we set a reasonable goal
 - We need a strategic plan based on a reasonable target
 - Have the city staff validate a reasonable water self-sufficiency goal by the year 2030
- How do we get there?
- Water is the key to everything else. We have little control over it, and there is a big cost to it
- What percentage of usage goes to residential, what percentage to agriculture, business, and industry?
- It should be known that the City has been addressing water and other issues. Everyone knows water is a key issue. We go to Washington DC every year and water is on the list. We are going this year to get stimulus package money from the Feds.
- We have desalination capability now. We could sink a well in the harbor and desalinate
- Water and sewer rate increases need consideration. We need to think about people on fixed incomes. So, again the dollar signs pop up again. How will we pay for the water supply and new options?
- Right now we can do water re-use, recycle water, and water desalination to cut water usage and stretch our resources
- We need to look at the new technologies that are out there, and leverage these
- We need a multiple pronged plan that includes immediate, short and long term solutions
- We can get support from the government stimulus package. We should aim to be the star example for other cities. Be the role model

Energy

- Do we want to be self-sufficient?
 - Sustainability model
 - Solar panels
 - City of Berkeley has a good plan we can look at
 - City of San Diego has an energy plan
 - Could have a revolving loan plan to put solar panels on the roof
 - Bring solar to the household level. Make it easy, have an approved system like we do with hot water heaters
- Main issue is that we are a coastal community. Therefore, some energy sources are just not compatible. Windmills for example, or nuclear power are not viable. Need to ask, what energy sources are compatible with our community?
- Transportation of energy. Lot of technology changes. Look at what energy production systems can we sign-up for?
- What is the maximum we can gain from going solar? Esther has addressed this in the past.
- The sewage treatment plant is one of the biggest users of energy – how can we reduce this?
- We need to stay on top of the changing technologies. We need more than solar alone. Nuclear may need to be an option
- Consider promoting efficient use of energy such as systems that deliver immediate hot water in homes, windows, create standards that will result in more energy efficiency for homes and industry
- Ordinate-based solutions that will improve efficiency of what we have
- Be aware of the “not in my backyard” response to energy solutions, especially to those other than solar. People will not want power lines in their neighborhood. Hard to sell the idea of power plant to locals – need to look at adjacent areas
- We cannot sell the idea of a power plant in Oceanside. Look at the military base. They have nuclear, have power lines; we can leverage this
- Also, the cost of land is too high to build
- Have a peaker plant at Pendleton
- Consider, how can we pay for the operational costs for new energy?
- There may be an opportunity with Pendleton, we can help by taking on the operational costs
- Consider a Regional sharing model
 - Peaker plants
 - New plants will be needed for all in the region
 - Federal support
 - Camp Pendleton

Land Use

- We have a diverse community, so we need to consider our diversity when planning land use
 - Consider transportation needs
 - Economic and cultural neighborhoods. Newer and older communities
 - Young start-up families and young college students
 - Agriculture & Morrell Hills
 - We need to recognize that we are a large city with diverse members such as older people, younger families, high-end, coastal, communities
- We need a General Plan update that fits with the economy. This needs to happen as a vehicle to get us where we want to go
- We may be able to find money for the General Plan update through our land use policies
- Let's agree or make it a goal to provide a way to let the free market drive land use. Allow for the market process to take place. Zoning could be part of this
- We need to look at redevelopment opportunities because the city is built up
- Smart Growth Plan and cross boundary issues will impact land use
- How do we finance these now? It is hard to plan ahead with the budget crisis on us now
- We will not get money from the state
- We need to ask the general public what are their goals? What do you want?
- Do planning all at once, not one region or zone at a time
- We need to consider other regional areas in our planning process
- We need to have a regional perspective – Vista, Carlsbad, etc. how they plan growth and land use impacts us. Need to work together, look at partnering. Have a regional vision for the greater San Luis Rey valley
- Outside boundaries - land use by other areas impact us. We need to get past "I" and "me" with other cities and Camp Pendleton

Growth Management

- We are not driving growth. Growth is driven by internal forces according to SANDAG. We will grow regardless of what we do.
- Consider starter homes
- Growth is tied closely to land use
- To sustain growth we need revenues coming in to support growth. How much money should the City put out across diverse groups – age, income, etc.
 - What is the cost benefit of stimulating growth of a particular demographic group?
- We need a diverse community – question is what % of various populations do we need to make the City viable? For example, do we have too many older people, too many younger, not enough of this or that?
 - Who should we attract here?
 - What are the revenue implications?
 - What job base do we need?
 - Housing?
- Baby boomers are drivers of land use
- Create incentives for growth and investment
- Growth mixture – we are already moving in this direction – Military is our blue-chip, tourist town, etc.
- Set land aside for job generation
- Need to consider costs because build-out is near
- How do we pay for services once build-out occurs? Can we afford to pay for build-out?
 - Consider re-development areas
 - Upgrading areas
- Jobs – we need to fill the spaces we already have in office and commercial
- Number 1 is to provide services
- Priority - residential housing does not pay for itself, jobs and industry pay the most
- Quality of life is important and we need to keep this along with growth
- We will have 220k people by the year 2030. How should Oceanside look?
 - Need to ask the citizens this question
 - How do you want us to make this happen? For example, do you want more starter homes, more retirement communities, etc?
- How do we reach 220k population and maintain the quality of life for our citizens?
 - What we build will have an impact on neighborhoods
 - Need to listen to the people
- Need to look past the 2-3 years of the down cycle and look at long range goals too.

Transportation

- Mass transit is not well planned in this region. What is the cost and how can we pay for this?
- We need to do better job of planning for mass transit. Think through, how can people get from one point to another – by rail, bus, etc., and how well do they connect with each other? Not well planned-out at this point.
- Who, and how do we pay for transportation costs? HOV lanes, etc.
- We need a diversity of transportation. Transportation will be a large need and how do we do this?
 - 45-55 year olds want to get there now. Widen I-5 and other roads
 - We need to plan – Money will come in from the Regional level when we sell the value and need
 - Alternate modes of transportation like mopeds, bikes, etc
 - We need a mind-shift, for example younger kids use bikes with motors – how can we accommodate this?
- Consider the Euro model – mopeds. Also, consider how to design the roadways to accommodate different modes of transportation.
- Study shows we need 43 people per acre to make public transportation work
- Move housing, such as senior housing closer to public transportation centers and areas of easy access to public transportation
- We have done things already to address transportation needs, for example we have senior vouchers and received a bike award for the City
- Look at Portland Oregon as an example
- Cost is an issue
- We have commuters coming in from outside of the City using our roadways and transportation systems. Charge them to use the roads.
- Airport transportation needs more consideration. We need reasonable solutions here.
- The price of fuel will drive our plans
- Need to consider parking needs

2012 Citywide Goals and Priorities

City Services

Implement fiscal sustainability policies to support core services that proactively ensure the health, safety and welfare of our citizens; attract, develop and retain a high performing municipal workforce; and fund internal infrastructure needs.

- *Initiate City Strategic Plan process*
- Effectively manage City's budget to ensure fiscal stability
- Develop priority plan for economic recovery
- Maintain essential services
- Stabilize utility rates
- Review City assets for revenue-generating potential
- *Address future PERS costs*

Sustainable Growth

Encourage and make effective use of infill, mixed use, traditional neighborhood development and redevelopment, as well as job producing centers to take advantage of infrastructure and transportation systems, maximize efficiencies in providing City services.

- Develop a strategic plan for City's Future will public outreach and participation to consider housing and neighborhood diversity. Get input on "what we do want to be" and update General Plan
- Coordinate future growth and infrastructure with Camp Pendleton and regional neighbors
- Develop a plan for 50% water independence by 2030
- Streamline development process
- Encourage market-driven development
- Develop plans to promote alternative energy use consistent with community vision
 - City facilities
 - Private properties
 - Potential loan programs
 - Energy efficiencies
- Develop plans for smart growth along transportation corridors (increased densities and growth will positively affect retail sales and revenue required to support City services)
- Develop incentives to encourage appropriate development in key areas of the City
- Encourage new development to implement efficient and sustainable land use and building practices
- *Obtain Zero Waste Goal including a permanent location for the Green Waste Facility*

Economic Vitality

Through collaboration and partnership with other public entities, private entities, and the military, support economic development efforts that attract, retain and create quality jobs to ensure a diverse economic base, a resilient and growing City tax base, and thriving neighborhoods.

- *Increase number of hotel rooms and encourage hotel development*
 - *On or near El Corazon*
 - *Citywide*
- Initiate alternative land-use study for Center City Golf Course
- Issue RFP for second Downtown Parking Structure
- Coordinate with NCTD and OUSD on future development options
- Coordinate with Military on business and utility projects
- Improve Oceanside jobs-to-housing ratio
- *Advance Downtown Beach Hotel project*
- *Aggressively pursue job creation opportunities*
- *Attract Biotech/Life Sciences businesses*
- Develop an Economic Development Incentive Plan to include attracting new businesses and retaining existing businesses

Quality of Life

Maximize resources that provide quality of life through City services and programs, sustainable growth and economic vitality goals; improve services for our citizens; safeguard environmental resources, including our natural landscape; and provide art, cultural and recreational amenities for Oceanside.

- Complete Sub Area Plan for the Multiple Habitat Conservation Plan
- Obtain flood insurance relief associated with San Luis Rey River
- Develop a neighborhood foreclosure assistance plan
- Develop a 5-year housing strategy
 - Low/moderate housing
 - "Starter" housing
- Promote alternate transportation modes
 - Bikes
 - Mass transit
 - Skateboards
 - Scooters, mopeds
- Collaborate and partner with other organizations to support local arts and culture
- *Maintain Public Library*

Civic Engagement

Fully realize the talents and positive contributions of nonprofits; private and public entities; the military; civic leaders; and engaged citizens and neighborhood groups to develop a shared sense of community and help achieve the Council's vision.

- Conduct City business with transparency
- Develop effective public relations and neighborhood outreach on key City projects and issues
- Expand City volunteer program

 **DRAFT**



Request For Proposals
for
Strategic Planning/Goal Setting
Facilitation for City Council

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SECTION 1: NOTICE OF REQUEST FOR PROPOSALS

1.1 Notice

Notice is hereby given that the City of Oceanside (hereinafter referred to as "CITY") seeks proposals for Strategic Planning/Goal-Setting facilitation for the City Council of the City of Oceanside and will receive such proposals in the City Manager's office, addressed to Michelle Skaggs Lawrence, Deputy City Manager, 300 North Coast Highway, Oceanside, CA 92054. The work to be done is more particularly described in Section 3, Specifications for Strategic Planning/Goal Setting Facilitations. Copies of the Request for Proposals (RFP) are available from the CITY in the City Manager's Office, 300 North Coast Highway, Oceanside, CA 92054 or on the City's website: www.ci.oceanside.ca.gov.

1.2 Due Dates

The response to this RFP must be received no later than 5 p.m., August 6, 2012. The proposal must be mailed or delivered to the City of Oceanside, Attention: Michelle Skaggs Lawrence, Deputy City Manager, 300 North Coast Highway, Oceanside, CA 92054. The outside of the envelope should identify it as RFP-Strategic Plan/Goal Setting. The CITY reserves the right to reject any and all proposals, and to waive any irregularity.

SECTION 2: DESCRIPTION OF ORGANIZATION

2.1 Overview

Oceanside was incorporated on July 3, 1888, with a population of approximately 1,000. Today Oceanside is a thriving community with 183,095 residents throughout the 42-square mile area. As the northernmost city in San Diego County, Oceanside is centrally located between Los Angeles and San Diego, enjoying proximity to all major Southern California destinations, while maintaining its coastal beauty and autonomy. With 3.5 miles of beach, a 1,000 boat slip harbor, the largest of the California missions and several regional museums, Oceanside offers year-round perfect weather and easy access to all of Southern California attractions. Oceanside is committed to providing exceptional services to the residents, visitors, and the business community.

The City of Oceanside is represented by a five-member City Council who are elected at-large for four-year overlapping terms in office. Non-partisan City elections are held in November of even-numbered years for Council Members. The City Council acts as the legislative body and sets policy, approves the budget, passes local laws, which are incorporated into the Municipal Code, and provides direction on City policies and

issues. The City Clerk and Treasurer are also elected positions who serve four-year terms.

The City operates under a Council-Manager form of government. Oceanside is a full-service City and provides the following services to the community's residents: general administration, building, engineering, code enforcement, parks and recreation, library, planning, public works, economic development, neighborhood services, and police and fire. The City's one-year budget cycle runs from July 1 to June 30. The FY 2011-2012 General Fund Budget is \$112M. The City of Oceanside's **Mission** is to enhance the quality of life through outstanding service to its diverse community. Its **Vision** statement is: The City of Oceanside will be a safe, culturally diverse community that empowers its citizens to provide an environment that promotes economic development, supports quality education, fosters the cultural arts and preserves its natural resources. The City of Ocean's **Core Values** are: Integrity... Diversity... Excellent customer service... Quality of life... Teamwork... Leadership... Innovation.

SECTION 3: SPECIFICATIONS FOR STRATEGIC PLANNING/ GOAL SETTING FACILITATION

3.1 Scope of Work

In an effort to clearly define the City of Oceanside's purpose and to establish goals and objectives consistent with its mission in a defined time frame within the organization's capacity for implementation, the City Council wishes to utilize the services of a professional facilitator to facilitate its annual strategic plan/goal setting effort, prioritize and rank City programs and services based on their ability to achieve these goals and to create a document to memorialize this effort. Additionally, the City Council wishes to engage the public in this effort to solicit public input, cultivate transparency and to build consensus concerning the CITY's future.

The CITY invites consultant firms or individuals experienced in strategic-plan/goal setting facilitation with elected officials to submit proposals. The CITY is looking for an objective voice, someone who is not likely to have strong predispositions about the organization's strategic issues and ideas in order for the entire CITY to benefit. The CITY is ultimately seeking consensus among its elected officials

Specific Tasks:

- A. Facilitation of Strategic Planning/Goal Setting and Workshop:
 1. Preparatory meetings (one to two days) with individual City Council members, City Manager, and City Attorney;
 2. One half-day workshop;

3. Three (3) community/public meetings to solicit public input; and
 4. Follow-up meeting with City Council to review results.
- B. One (1) Half-Day Workshop would include:
1. Assessment of the City's strengths, weaknesses, opportunities and threats;
 2. Review of the City's Mission, Vision and Core Values statements;
 3. Identify and develop specific short-term and long-term goals and priorities for the City; and
 4. Identify potential fiscal constraints and opportunities in order to achieve strategic goals and objectives.
 5. Review budget process for potential modifications.
- C. It is the desire of the CITY to perform the Strategic Plan/Goal-Setting Facilitation in the month of _____.
- D. Facilitator must summarize the results of the workshop and community/public meetings and prepare a document that confirms the City's Mission, Vision and Core Values, as well as identifies the Council's strategic goals and objectives for Fiscal Year 2013-2014, and prioritizes and ranks the City's programs and services based on their ability to achieve these goals.

3.2 Qualifications

The firm or individual responding to this RFP must provide the following:

- A. Evidence of substantial knowledge and experience in developing strategic plans/goal-setting efforts for local government organizations.
- B. Evidence of substantial knowledge and experience in facilitating strategic planning/goal setting efforts at the elected-official level.

3.3 Content and Format of Proposals

The proposals must contain the following information in order to be considered:

3.3.1 Cover Letter

A cover letter on firm letterhead must provide the name and title of the person(s) who are authorized to answer questions about this RFP. The cover letter should not exceed one (1) page in length and should summarize key elements of the proposal. The letter must include the telephone, fax number and

email address and physical address of your office located nearest to Oceanside, California.

3.3.2 References

Provide the name and contact information for five (5) City Councils and/or County Boards of Supervisors, where facilitator has worked in a goal-setting/strategic planning effort. Provide a copy of one strategic plan developed for one of these elected bodies.

3.3.3 Process

- A. Describe how you would facilitate the required three public/community input meetings.
- B. Describe how you would format and handle the half-day Council Workshop.
- C. Describe the format for your final annual strategic plan/goal setting document.

3.3.4 Costs

Please provide "not to exceed" costs for the following categories:

- A. Pre-meetings with Councilmembers, City Manager, and City Attorney;
- B. Three (3) community meetings;
- C. One (1) half-day Workshop;
- D. One (1) follow-up meeting with the City Council; and
- E. Preparation of final report.

3.4 Proposer's Responsibilities

3.4.1 Proposer is an Independent Contractor

The Proposer shall act under the agreement as an independent contractor and will not be an agent or employee of the CITY.

3.4.2 Compliance with the Law

The Proposer agrees that performance under the PSA shall comply with applicable laws of the United States of America, the State of California, and the County of San Diego, and that Proposer also comply with all applicable policies and regulations of the City of Oceanside.

3.4.3 Insurance Requirements

All Proposers with the CITY must show proof of insurance. A certificate of insurance and endorsement will be required indicating compliance with the following minimum insurance requirements and the contractor shall maintain such insurance in effect during the entire term of the PSA with the CITY.

- A. Workers' Compensation Insurance to cover the contractor's employees as required by the California Labor Code. Before execution of an agreement by the CITY, contractor shall file with the CITY a signed Worker's Compensation Insurance Certification. In the event that the contractor has no employees, it will be required to file a certification that the contractor has no employees. The CITY and its officers, employees, and agents will not be responsible for any claims in the law or equity occasioned by failure of contractor to comply with its PSA with the CITY.

- B. Commercial General Liability, personal injury and property damage liability, contractual liability, independent contractor's liability, and automobile liability insurance, with minimum combined liability limits of One Million Dollars (\$1,000,000) per occurrence, and a maximum of deductible of One Thousand Dollars (\$1,000) per occurrence. Each such policy of insurance shall:
 - 1. Be issued by companies that hold a current policy holder's alphabetic and financial size category rating of not less than A-VII, according to the current Best's Key Rating Guide or a company of equal financial stability that is approved by the City's Risk Manager for all coverages except surety.
 - 2. Name and list as additional insureds the CITY, CITY's officers, employees, and agents. An endorsement shall accompany the insurance certificate naming such additional insureds.
 - 3. Specify it acts as primary insurance and that no insurance held or owned by the CITY shall be called upon to cover a loss under said policy.
 - 4. Contain a clause substantially in the following words: "it is hereby understood and agreed that this policy may not be canceled or materially changed except upon 30 days prior written notice to the CITY of such cancellation or material change as evidenced by a return receipt for a registered letter."
 - 5. Cover the operations of the contractor pursuant to the terms of this the PSA; and
 - 6. Be written on an occurrence and not a claims made basis.

3.4.4 Equal Employment Opportunity

The Proposer shall not discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin, age or disability. The Contractor shall ensure that all employees and applicants for employment shall be treated with equality in all aspects of employment processes including, but not limited to, hiring, transfer, promotion, training, compensation and termination, regardless of their race, creed, color, sex, national origin, age or disability.

SECTION 4: INSTRUCTIONS FOR SUBMITTING PROPOSALS

4.1 Delivery of Proposals

All Proposals shall be typewritten or printed in ink clearly and legibly in conformance with the Instruction for Submitting Proposals, in accordance with section 1.5, and submitted in a sealed envelope plainly marked on the outside, **"SEALED PROPOSAL FOR OCEANSIDE CITY COUNCIL STRATEGIC PLANNING/GOAL SETTING FACILITATION – DO NOT OPEN WITH REGULAR MAIL."** The Proposal shall be signed by an authorized agent of the Proposer.

Any proposals received by the City Manager's Office after the specified hour and date shall be returned unopened. Postmarks will not be acceptable in lieu of actual receipt prior to the prescribed hour and date.

4.2 Proposal Documents

The Proposal Documents must comply with this RFP and must respond to all requested information. Unnecessary elaborate or glossy proposals are neither expected nor desired. The emphasis of the proposal should be on responding to the requirements set forth in this RFP.

4.3 Interpretations of the Request for Proposals

If the Proposer is in doubt as to the true meaning of any part of the RFP, or finds discrepancies in or omissions from the RFP, the Proposer shall submit to the City Manager's Office a written request for an interpretation. The Proposer shall be responsible for the prompt delivery of the request and must comply with the specified due date.

The CITY shall not be responsible for any explanation or interpretations of the RFP other than by written notice. No oral interpretations of any provision in the RFP shall be binding upon the CITY.

4.4 Review of Proposals

After all the proposals are received and opened by the City Manager's Office, all proposals shall be reviewed and evaluated for responsiveness to the RFP in order to determine whether the Proposer possesses the professional qualifications necessary for the satisfactory performance of the services required. Qualifications of all Proposers to whom the PSA is contemplated will be investigated. The City Council and the City Manager will be involved in the review of the proposals. It is anticipated that this review period will last approximately thirty (30) to sixty (60) days. The City Council will ultimately select the facilitator.

In reviewing the proposals, the CITY will consider the following:

- The experience and past performance of the Proposer, its agents, employees and subcontractors in completing projects of a similar type, size and complexity.
- The CITY shall consider Proposer's timely and accurate completion of similar projects within budget.
- PROPOSER's understanding of the work to be completed based upon the clarity of the proposal and responsiveness to this RFP.
- Evaluation criteria include, but are not limited to, the understanding of the proposed requirements as evidenced by the quality of the proposal response, relevant experience conducting similar strategic planning/goal setting facilitation for elected municipal and/or county officials, qualifications of staff to be assigned, project understanding, recent experience and proposal costs. The City may not necessarily select the lowest cost proposer.

4.5 Award of Professional Service Agreement

Upon completion of the review period, Proposers whose proposals will be considered for further evaluation will be notified. All Proposers so notified will be required to make presentations and negotiate in good faith.

The CITY reserves the right to reject any or all proposals, and to waive any irregularities. The award of the PSA, if made by the CITY, will be based upon a total review and analysis of each proposal and projected costs.

Once a Proposer has been selected, the CITY will negotiate a professional services agreement. The CITY shall not be contractually obligated to any Proposer until duly authorized representatives of both the PROPOSER and the CITY sign an agreement. The professional services agreement shall obligate the Proposer to defend, indemnify and hold the City and its officials and employees harmless from and against any claims for damages arising from the work performed by the Proposer.