

# City of Capitola



## Request for Proposals Strategic Plan Development for the City of Capitola

Issue Date: October 20, 2023  
Proposal Deadline: November 10, 2023

City of Capitola  
City Manager Department  
420 Capitola Ave.  
Capitola, CA 95010

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# REQUEST FOR PROPOSALS

## Strategic Plan Development

### INTRODUCTION

The City of Capitola (City) is seeking qualified firms/vendors to submit proposals to develop a strategic plan for the City of Capitola.

All proposals must be submitted to the City Manager Department at 420 Capitola Ave, Capitola, CA 95010 by 5:00 P.M. on Friday, November 10, 2023. All proposals must be in the format specified, enclosed in a sealed envelope and clearly identified with proposal title, name of proposer, and date of proposal closure. Responding firms shall be solely responsible for any expenses incurred in preparing proposals in response to this request.

The City may select a Service Provider based on proposal alone or may narrow the field to the top firms based on strength of proposal, and then conduct interviews to finalize a selection. The City will then initiate contract negotiations with the selected Service Provider. Pending successful negotiations, the City will have the Service Provider execute the City's Standard Professional Services Agreement (Attachment A).

It is the intent of the City to award the contract for services in in late 2023 or early 2024. Proposals will be considered only from parties that are free of all obligation and interests that may conflict with the best interest of the City of Capitola and have the capacity to provide services on a timely basis.

### BACKGROUND

The City of Capitola is a small coastal community located in Santa Cruz County that occupies approximately two square miles and serves a population of about 10,150. Located on the northern edge of Monterey Bay, approximately 35 miles north of Monterey and 75 miles south of San Francisco, Capitola enjoys a rich history and offers residents diverse recreational opportunities. Capitola Village is located along a sandy beach with expansive views of Monterey Bay and is home to numerous craft galleries, boutiques, and restaurants.

Capitola is a General Law City and was incorporated on January 11, 1949. The City is subject to the framework and procedures established by State Law and operates under the Council – City Manager form of government. The Council is comprised of four Council Members and a Mayor, all of whom are directly elected by the citizens. The Council Members serve four-year staggered terms; and the Mayor and Vice-Mayor are elected annually by the Council. The City provides police protection, recreation, building, planning, zoning, administrative services, financial services, street, park and facilities maintenance for Capitola. Independent special districts provide fire protection, water, sewer, and limited drainage services.

Capitola City Council requested that staff research and develop a Strategic Plan to guide Council, staff, and budgetary priorities over a dedicated time frame. Staff seeks proposals that outline a work plan to develop a Strategic Plan including the following services: supporting staff in conducting community outreach, facilitating a visioning session with City Council, compiling information received, identifying key focus areas/goals, and working with staff to draft a proposed strategic plan. The City of Capitola is open to guidance on how to best develop a strategic plan for a jurisdiction of our size and is open to further communication and recommendations on how to partner on this project.

The City will administer the proposal process in accordance with the terms and dates outlined in this RFP; however, the City reserves the right to modify the activities, timeline, or any other aspect of the process at any time, as deemed necessary. By requesting proposals, the City is in no way obligated to award a contract or pay the expenses of proposing firms in association with the preparation or submission of a proposal. The award of any contract shall be contingent on the requisite staff and City Council approvals.

## SCOPE OF WORK

### Summary Scope of Work

The City of Capitola (hereinafter referred to as City) invites your organization to submit a written proposal to develop a Capitola Strategic Plan in partnership with City staff and the City Council.

### Strategic Plan Development Activities:

- Design, in partnership with City Manager Department staff, a work plan to develop a strategic plan that identifies five to six focus areas that the City of Capitola will prioritize over a five or 10 year timeframe.
- Conduct a citywide needs assessment using identifiable methodologies such as SWOT or SOAR
- Organize and facilitate a community outreach meeting to gather feedback from City residents, business owners, and other stakeholders.
- Review survey data collected by City staff; unify all community input with City needs assessment in presentation/results document
- Facilitate visioning meeting/workshop with City Council (half-day maximum)
- Analyze, review, and summarize data; present to City staff and Council
- Prepare draft strategic plan in partnership with City staff

### Strategic Plan Development Process/Deliverables:

- Strategic Plan development timeline
- Results of citywide needs assessment
- Results of community outreach meeting
- Suggestions on community survey content
- Recommended focus areas, goals, and strategies that make up the proposed strategic plan
- Visioning meeting/presentation to City Council
- Draft strategic plan

## PROPOSAL EVALUATION AND AWARD

A contract for the **Development of a Strategic Plan** will be awarded based on the following criteria:

Qualifications and Relevant Experience: Years in the business and qualifications of individuals and team and experience providing similar services for local government agencies

Thoroughness and Organization of Proposal: Staff will assess that the proposal: 1) Includes all elements of the proposal, 2) Is organized, concise and thorough, 3) Demonstrates understanding of the scope of work as well as the consultant's approach to accomplishing the scope of work.

Methods and Procedures: Staff is looking for demonstrated ability to provide qualified and experienced personnel and reliable availability of lead and all proposed team members. Staff will also assess the

consultant's general approach to providing services, the description of procedures and methods for services and for demonstrated ability to deliver services in a timely manner

Cost Estimates: Staff will compare the costs for providing the proposed scope of services to the quality of work proposed.

Reference Checks: City staff will check for customer satisfaction, cost versus product level of service, and communication strengths and analytical skills.

## PROPOSAL REQUIREMENTS

In your proposal please provide the following:

Cover Letter: Shall be signed by an official authorized to bind the firm and shall contain a statement indicating that the proposal is valid for ninety days.

Project Understanding: Present your understanding of the project and the general approach to be used.

Scope of Work: Provide a detailed Scope of Work proposed to accomplish the tasks. The scope of work shall also clearly set forth services that are not included or anticipated as part of the proposal.

Personnel: Present the experience of the Account Manager and other key personnel to be assigned to the City, including any sub-consultants. A resume shall be included for the Account Manager and other key personnel, including education, employment history and experience relevant to the project, with corresponding dates. During the course of the project, substitution of key personnel is subject to the approval of the City.

Relevant Experience: Provide a list of projects where the proposed Account Manager and key team members have performed similar work. For each, provide the name of project, location, brief description, and name and phone number of a contact person.

Project Schedule: Provide a proposed project schedule identifying start and end dates – include milestones, submittal of deliveries, and each task required for successful and timely completion of the project.

Please limit the proposal to no more than 11 pages of text, exclusive of resumes. Provide a fee schedule that includes all fees that may be charged for providing services requested in this RFP. Provide three (3) hard copies of the proposal and one electronic copy of the proposal via email to Chloé Woodmansee, [cwoodmansee@ci.capitola.ca.us](mailto:cwoodmansee@ci.capitola.ca.us)

## EVALUATION OF PROPOSALS AND NEGOTIATIONS

The City Manager Department will review proposals and select from those received. The department will select the proposal that best fulfills the City's requirements. The City may negotiate with the selected Service Provider to determine final pricing and contract form. Depending upon the response, authorization of the contract with selected Consultant may be required by City Council.

## CONDITIONS AND STIPULATIONS

The City reserves the right to reject any and all proposals, cancel all or part of this RFP, and waive any non-material irregularities or informalities and to request additional information and clarification regarding any particular service from the proposing Service Providers.

The City reserves the right to reject any proposal for any reason. The proposal should be the best effort possible by the Service Provider, since the City reserves the right to award the contract with no further negotiations. Conversely, the City reserves the right to negotiate with the selected proposer any additional terms and conditions not contained in their proposal, which are in the best interest of the City or to otherwise revise the scope of this RFP. All proposals, whether accepted or rejected, shall become the property of the City of Capitola. All proposals received become public records. The City's decision to award a contract will be based on many factors including, but not limited, service, cost, experience, ability to deliver, and for any other reason deemed by the selection committee to be in the best interest of the City. No single factor, such as cost, will determine the final decision to award a contract. This RFP and the Service Provider's responses, including all promises, warranties, commitments, and representations made in the selected proposal, shall become binding contractual obligations, and will be incorporated by reference in the final agreement between the City of Capitola and the selected Service Provider. All terms and conditions not specifically identified as exceptions will be considered acceptable to the Service Provider.

## ESTIMATED TIMELINE (Dates are subject to change)

Distribution of RFP	October 20, 2023
Deadline for Questions	October 30, 2023
Closing Date	November 10, 2023 at 5pm
Vendor Selection & Interviews if necessary	November 13 – 17, 2023
Contract Award	November 21, 2023

## CONTACTS

For questions regarding the scope of proposal or the proposal process, please submit questions through email to:

Chloé Woodmansee, Assistant to the City Manager  
[cwoodmansee@ci.capitola.ca.us](mailto:cwoodmansee@ci.capitola.ca.us)

## SUBMISSION INFORMATION

Three hard copies of the proposals must be submitted to:

**City of Capitola**  
**City Manager Department**  
**Attention: Chloé Woodmansee, Assistant to the City Manager**  
**420 Capitola Ave**

**Capitola, CA 95010**

Digital version of the proposed must be submitted to:

Chloé Woodmansee, Assistant to the City Manager  
cwoodmansee@ci.capitola.ca.us

All proposals must be delivered no later than **5:00 p.m. on November 10, 2023.**

## ATTACHMENTS

Attachment A: Standard City Professional Services Agreement – Insurance and Indemnifications

Thank you for your interest in working with the City of Capitola for this service. We look forward to receiving your proposal.