



CITY OF EUREKA, CALIFORNIA

REQUEST FOR PROPOSAL (RFP)

PROJECT TITLE: BLUE OX STRATEGIC PLAN

**FULL PROJECT TITLE: BLUE OX HISTORIC VILLAGE AND SCHOOL STRATEGIC
PLAN FUNDED BY
CALIFORNIA OFFICE OF HISTORIC PRESERVATION CLG GRANT FUNDING**

Contact Person: Kristen M. Goetz, Senior Planner
City of Eureka
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Critical Dates and Requirements

RFP Announcement Released:	July 27, 2015
Deadline for Submittal of Questions:	July 31, 2015
Addendum #1 (answers to questions):	August 4, 2015
Proposals Due:	August 7, 2015 (5pm)
Council Action to Award:	August 18, 2015
Notice to Proceed; Contract Start Date:	September 1, 2015
Submit Final Report to City:	August 1, 2016
Presentation to Council/Contract Completion Date:	August 16, 2016

NOTICE OF REQUEST FOR PROPOSALS

City of Eureka Bid#: 2015-09

PROJECT TITLE: BLUE OX STRATEGIC PLAN

1. The City of Eureka (hereinafter "CITY") is soliciting Requests for Proposals for the "BLUE OX STRATEGIC PLAN," (hereinafter "PROJECT"), and will receive proposals in the Development Services Office, 531 K Street, Eureka, California, 95501, up to the hour of **5:00 PM, Friday August 7, 2015.**

The services to be performed by the successful proposer are described in the Request for Proposals. Copies of the Request for Proposals are available at: <http://www.ci.eureka.ca.gov/rfps/bids.asp>.

2. All responsive proposals shall be reviewed and evaluated by the CITY in order to determine which proposer best meets the CITY's needs for the PROJECT. The criteria by which the CITY shall evaluate proposals are set forth in the Scope of Work.
3. The CITY reserves the right to reject any and all proposals or waive any irregularities in any proposal or the proposal process.
4. Since solicited services are to be funded with California program funds, state laws and regulations require that all contracts with consultants adhere to all applicable requirements relating, but not limited to, nondiscrimination, equal opportunity, environmental protection, and utilization of small business concerns.
5. The City of Eureka is not responsible for any costs incurred in the preparation of proposals and/or any work rendered by a firm prior to the contract award.


Kristen M. Goetz
Senior Planner

7/27/15
Date

Background Information:

The City of Eureka (CITY) has received a CLG Grant from the California State Historic Preservation Office for a Blue Ox Strategic Plan. CITY is seeking a consultant or consultant team (CONSULTANT) to complete the study. The budget that will be allotted to CONSULTANT will be \$25,000.

The Blue Ox Strategic Plan will create a Strategic Plan which demonstrates the financial, regulatory and cultural pathway to the development of a sustainable historic village site and school structure for the Blue Ox Historic Village and School as part of a larger vision for the shoreline of the City of Eureka.

Scope of Services:

Each of the following tasks include as a deliverable a chapter of the Final “Blue Ox Strategic Plan” Report. The final report will contain the following sections:

- Section 1: Strategic Plan for the Village
- Section 2: Strategic Plan for the School
- Section 3: Site Plan and Soils Analysis
- Section 4: Communications and Outreach Effort Plan (Consultant does not need to bid on this Section; Blue Ox will complete this section)

The project will initiate with a Kick Off meeting in which consultant, CITY, and Blue Ox representatives will review all PROJECT tasks, deliverables, schedule, and budget.

Each task includes other deliverables in addition to the sections of the final report. The scope of work for each of the four PROJECT tasks is outlined below.

Task 1: Strategic Plan for the Village

For this task, Consultant will review the existing architectural plan for the potential village site. The key component of this section will be the development of financial projections for the tourism component of the village, including order-of-magnitude construction cost estimates as well as estimated staffing costs, operational costs, revenue potential, and liability/insurance costs/concerns.

Research will be conducted on similar non-profit historic village operations/costs and revenue generation mechanisms in order to develop reasonable estimates. Research should also identify potential approaches that the Blue Ox could use in order to increase tourism to its site. This research should determine if the projected tourism revenue would provide sufficient revenue for operations. Research will also be completed for potential additional attractions, including a trolley utilizing existing tracks from Blue Ox south through the Eureka waterfront.

Blue Ox will provide historical financial data for its current village site, as well as architectural plans for the proposed site. Blue Ox staff will be available to answer questions from consultant as needed.

Finally, Consultant will complete Section 1 of the Final “Blue Ox Strategic Plan” Report.

Task 1 Deliverables:

1. *In-depth analysis of the potential financial revenue and expenses for the tourism component of the Blue Ox Historic Village.*
2. *Comparison of the proposed Blue Ox Historic Village to other historic villages in the US.*
3. *Narrative description of the historic village operations including recommendations for ways to increase revenue or reduce expenses.*
4. *Section 1 of Final "Blue Ox Strategic Plan" Report:*
 - a. *Narrative description of the proposed historic village operations.*
 - b. *Financial projections for the tourism component of the historic village.*
 - c. *Comparisons of the proposed historic village to similar historic villages.*
 - d. *Recommendations for changes to current historic village practices.*

Task 2: Strategic Plan for the School

This task is identically structured to Task 1. This task differs only in that the analysis focuses on the proposed expanded school operations instead of the historic village operations. Accordingly, many of the activities under this task may be conducted simultaneously with Task 1.

For this task, Consultant will review the existing school operations including high school operations and veteran operations. Research will be conducted on similar non-profit school operations to develop reasonable estimates for the potential for Blue Ox to increase school attendance including attracting new potential student populations.

Blue Ox will provide historical financial data for its current school operations, as well as capacities for new instruction programs. Blue Ox staff will be available to answer questions from consultant as needed.

Finally, Consultant will complete Section 2 of the Final "Blue Ox Strategic Plan" Report.

Task 2 Deliverables:

1. *In-depth analysis of the potential financial revenue and expenses for the school component of the Blue Ox Historic Village and School.*
2. *Comparison of the proposed Blue Ox Historic Village and School to other traditional arts schools in the US.*
3. *Narrative description of traditional arts school operations including recommendations for ways to increase revenues or reduce expenses.*
4. *Section 2 of Final "Blue Ox Strategic Plan" Report:*
 - a. *Narrative description of the proposed traditional arts school operations.*
 - b. *Financial projections for the traditional arts school component of the historic village.*
 - c. *Comparisons of the proposed traditional arts school to similar schools.*
 - d. *Recommendations for changes to current traditional arts school practices.*

Task 3: Site Plan and Soils Analysis

The proposed site for the expanded Historic Village and School is located adjacent to the shoreline of Humboldt Bay on land that contains significant quantities of historic dredge spoils. As such, the site may pose significant constraints for the construction of rigid structures on much of the property.

A preliminary site plan for the village and school has been previously prepared based on a soils analysis conducted for the site several years ago. This task involves reviewing the existing preliminary site plan and modifying it based on the findings of Tasks 1 and 2. This task also involves evaluating the previously conducted soils studies as needed to ensure that the recommendations in Tasks 1 and 2 are feasible on the proposed site. Any findings from the soils analysis that would affect the existing site plan would also require edits/modifications to the existing site plan.

The work in Task 3 must be performed by persons with the appropriate qualifications to evaluate/revise site plans and to determine site constraints based on existing soils reports.

Blue Ox will provide the existing site plan as well as initial soils study data.

Task 3 Deliverables:

1. *Analysis of existing site plan based on findings of Tasks 1 and 2.*
2. *Modifications to existing site plan based on findings of Tasks 1 and 2.*
3. *Evaluation of previously conducted soils studies as needed to ensure that the recommendations in Tasks 1 and 2 are feasible on the proposed site.*
4. *Comparison of the soil analysis, historic village recommendations, and school recommendations to the existing site plan.*
5. *Modification of the site plan as needed to reflect new data obtained in the preparation of the plan.*
6. *Section 3 of Final "Blue Ox Strategic Plan" Report:*
 - a. *Soils Analysis*
 - b. *Updated Site Plan*

Task 4: Communications and Outreach Effort Plan

This task is part of the final Strategic Plan Report and will be included in all presentations of the material. However, all work on this portion will be conducted by Blue Ox representatives and will be provided to the successful bidder. Completion of this portion will be the sole responsibility of Blue Ox and will not impact the consideration of completeness of the consultants work. Consultant does not need to expend any effort or budget on this task.

Task 4 Deliverables:

1. *None*

Other Activities:

The following additional activities must also be completed during this PROJECT. Consultant must propose to conduct these activities within the budget and timeline of the above Tasks. The following additional activities must be accounted for in the Consultant's proposal and fee. These activities may be presented as an additional task.

The following additional activities must be accounted for in the Consultant's proposal:

- PROJECT kickoff meeting (virtual or in-person).
- Periodic PROJECT management meetings (virtual or in-person).
- Overall PROJECT management.
- Submittal of comprehensive final draft report to City staff (must include Sections 1 through 3)
- Final presentation to City Council (this task may be optional as City staff could conduct the final presentation to Council)

Delivery of RFP:

It is the Proposer's responsibility to ensure that the RFP is received by CITY prior to the hour and date for submittal of the proposal specified in the Request for Proposal. Any proposals received by CITY after the hour and date shall be rejected and returned unopened. Proposals shall be mailed or hand-delivered to Kristen M. Goetz, Development Services Office, 531 K Street, Eureka, California, 95501. Proposals shall be received by 5:00 PM, Friday, August 7, 2015. Postmarks will not be accepted. The Proposal shall also be submitted by email by 5:00pm on July 27th, 2015, to Kristen Goetz at mgurley@ci.eureka.ca.gov. All proposals, whether selected or rejected, shall become the property of CITY. CITY is not responsible for proposals delivered to a person/location other than specified above.

Format of RFP:

All submittals shall be typewritten or printed in ink clearly and legibly, in conformance with this RFP. Proposals shall be printed double-sided. Five (5) bound copies and one (1) unbound copy of the proposal shall be submitted in an envelope plainly marked on the outside: "Blue Ox Strategic Plan." Cost estimates shall be submitted in a sealed, separate envelope.

Contents of Proposal:

Proposals shall include the following information presented in a clear and concise format in order to demonstrate the Proposer's related experience, competence and professional qualifications for the satisfactory performance of the services outlined in the PROJECT "Scope of Work" section of this Request for Proposals.

1. Cover Letter (5 points): A cover letter (2 pages maximum) outlining consultant's interest in the PROJECT. Cover letter may include other information.

2. Firm Experience (20 points):
 - a. Firm Profile: Overview of consulting firm(s) and description of services offered.
 - b. Project Descriptions: A minimum of three descriptions of recent projects for which the Project Team has performed services of similar size, scope, and complexity. Each project shall include the name, contact person, address, and phone number of each party for whom the service was provided, a description of the service performed, the dollar amount of the contract, and the dates of performance.
 - c. Team Member Biographies: Brief professional biographies of the principals, employees, agents, and subconsultants (PROJECT team) which the proposer will assign to this PROJECT. Biographies shall include: a summary of the qualifications, licenses, and experience of each individual; the approximate number of hours each will devote to the PROJECT; and the type of work to be performed by each individual. The CITY will retain under its Agreement with the successful Proposer the right of approval of all persons performing under the Agreement.

3. Understanding and Scope (45 points):
 - a. Understanding: A brief summary of the Consultant's understanding of the overall PROJECT.
 - b. Scope of Work: A detailed scope of work outlining the Consultant's proposed approach to Tasks 1 through 3 in the Scope of Work outlined above. This must be based on the scope outlined above. Consultants are encouraged to develop creative and innovative approaches.

4. Schedule and Management Plan (25 points):
 - a. Schedule: A work plan or schedule for all services necessary to complete this PROJECT. The proposal shall specify the major PROJECT tasks and the expected time of completion for each task based on the scope of services outlined in the proposal.
 - b. Management Plan: This PROJECT includes a range of diverse tasks that must be completed within the time frame designated above with a maximum budget of \$25,000. Neither the budget, schedule, nor scope can be altered from that which is presented in this RFP. At no point during the PROJECT will CITY increase the budget, extend the timeline, or alter the scope. Accordingly, proposals must include a brief description of the consultant's "budget and schedule management plan" that describes the consultants approach and commitment to working within the established budget, schedule, and scope. The plan does not need to include great detail, but must demonstrate the consultant's overall PROJECT management approach to satisfying the scope within the established schedule and budget.

Management plan should include periodic progress meetings with a project management team consisting of representatives of the consultant, the CITY, and Blue Ox. These meetings may be conducted remotely.

5. Other Requirements (5 points):

- a. A statement which discloses any past, ongoing, or potential conflicts of interest which the Proposer may have as a result of performing the work on this PROJECT.
- b. A statement confirming that consulting firm is operating under a legitimate business license.
- c. A statement confirming that consulting firm, if selected, can provide certificates of insurance that meet the City's requirements.
- d. The proposal must be signed by an authorized representative of the Proposer.
- e. Applicants shall submit copies of their proposal to CITY by mail or hand delivery by 5:00pm on August 7, 2015. Postmarks will not be accepted.
- f. Applicants shall also submit a copy of their proposal to CITY by email to mgurley@ci.eureka.ca.gov by 5:00pm on July 31, 2015.
- g. Fee: A total "Not to Exceed" cost of the services, including a Fee Schedule describing all charges and hourly rates of service and any expenses to be reimbursed shall be included with the percentage of PROJECT costs. The scope of work section above identifies the budget for each task. Budget may not be moved between tasks. Cost estimates must be submitted in a sealed, separate envelope.

The City of Eureka is not responsible for any costs incurred in the preparation of proposals and/or any work rendered by a firm prior to the contract award.

Submittal of Questions and Release of Addendum #1:

This RFP was released on Monday, July 27, 2015. Questions regarding the RFP shall be submitted to CITY via email (mgurley@ci.eureka.ca.gov) no later than July 31, 2015. On August 4, 2015, CITY will post Addendum #1 on the City's website. Addendum #1 will answer the questions posed. CITY shall not be responsible for any explanations or interpretations of the Request for Proposal other than by Addendum #1 which will be posted on the City's website on August 4, 2015. No oral interpretations of any provision in the Request for Proposals shall be binding upon CITY.

PROPOSAL EVALUATION

The City of Eureka is using the competitive proposal process, wherein the experience and approach of each submitted proposal is evaluated as it relates to the Scope of Services and other elements outlined in this RFP. All proposals will be reviewed and rated by a selection panel according to the following criteria:

1.	Cover letter outlining consultant's interest in PROJECT.	5 points
2.	Overall experience of firm in conducting activities similar to those in the Scope of Services.	20 points
3.	Consultant's overall understanding of the PROJECT and quality of the approach presented in the Scope of Services	45 points
4.	Schedule and management plan	25 points
5.	Other requirements	5 points
Total		100 Points

The City of Eureka reserves the right to negotiate final scope of services, accessibility and maximum administration funds to be available under this proposal with the successful firm. An evaluation committee will be assembled to review all proposals and will report its recommendation to the City Manager and City Council.

The City of Eureka, its Governing Body, retains the right to reject any and all proposals and will award the contract. Selection will be made within 15 days of the proposal deadline, if possible. The City of Eureka reserves the right to award a contract to the firm that presents the proposal, which in the sole judgment of the City of Eureka, best serves the City of Eureka. The City of Eureka reserves the right to reject any or all proposals, to waive minor irregularities in said proposals, and/or to negotiate minor deviations with the successful firm.

Prior to contract awarding, the selected firm shall obtain a business license and submit certificates of insurance naming the City of Eureka, its officers, officials, employees, and volunteers as additional insured. Insurance coverage and amounts are specified in the Contract (attached).

City Reservation of Rights:

The City reserves the right, at its sole discretion, to use without limitation, concepts, and data submitted in response to this RFP, or derived by further investigation thereof. The City further reserves the right at any time and for any reason to cancel this solicitation, to reject any or all proposals, to supplement, add to, delete from, or otherwise alter this RFP if the conditions so dictate. The City may seek clarification from a potential consultant at any time and failure to respond promptly may be cause for rejection. The City also reserves the right to interview only those firms that the City finds, in its determination, the most advantageous services and to negotiate with one or more vendors to establish contract terms acceptable to the City.

Compliance with State and Federal Laws:

The consultant shall certify compliance with all applicable laws and regulations, both State and Federal.