



CITY OF PACIFIC GROVE
300 Forest Avenue, Pacific Grove, California 93950

AGENDA REPORT

TO: Honorable Mayor and Members of the City Council

FROM: Tori Hannah, Administrative Services Director

MEETING DATE: January 17, 2018

SUBJECT: Consider Authorizing the City Manager to Select a Consultant and Approve a Contract for Public Opinion Polling to Assess Feasibility of a Revenue Measure

CEQA: Does not constitute a "Project" under California Environmental Quality Act (CEQA) Guidelines.

RECOMMENDATION

Authorize the City Manager to Select a Consultant and Approve a Contract for Public Opinion Polling to Assess Feasibility of a Revenue Measure

DISCUSSION

Over the last fiscal year, the idea of a potential revenue measure has surfaced. To assist with planning, staff presented sample timelines associated with placing a revenue measure on the ballot at the December 6, 2017 Council Meeting. A copy of the key steps and decision points reviewed at that meeting are included in Attachment 1. The City will need to provide a recommendation by July to place a revenue measure on the November 2018 ballot. This leaves approximately seven months to *potentially* assess, prepare, and implement a plan.

One of the first steps to proceed with a revenue measure is to retain public opinion polling services. These services have been instrumental with other Cities receiving voter approval. The information gained from public opinion polling can assist in identifying public support, community needs, and potentially assist with the development of future outreach efforts. The Council approved issuing a Request for Proposal for Public Opinion Polling Services at the December 6, 2017 Council Meeting. The issuance of the RFP does not obligate the City to enter into a contract; however it assists in preserving the City's ability to effectively prepare for a possible revenue ballot measure. Staff was also directed to present information on City finances and projected capital improvement needs prior to making a decision on awarding a contract. This information was presented in Item 13A.

Due to the holidays and the tentative scheduling of a Special Meeting, all RFP responses are due on January 12, 2018. Copies of the RFP were distributed to eleven firms (Attachment 2). It is anticipated that the contract costs should be under \$30,000. This amount is within the City Manager's approval authority and subject to the City's standard agreement. Staff is requesting approval to evaluate, negotiate, and award a contract based on Council's assessment of the City finances. All proposals will be evaluated by an internal panel, with rating criteria based on experience, qualifications, the ability to understand the City's needs, and reference checks. Additional criteria are listed within the RFP. Approval of this contract does not obligate the City to move forward with the revenue measure; however it provides the Council with the information

needed to assess whether the City should advance to the next step within the process. A detailed draft calendar is provided in Attachment 3.

FISCAL IMPACT

There is no fiscal impact. Sufficient funds are available in the Fiscal Year 17/18 Finance Department budget.

GOAL ALIGNMENT

Financial Sustainability

ATTACHMENTS

1. Sample Revenue Measure Milestones
2. Request for Proposal Public Opinion Polling
3. Draft Detailed Calendar

RESPECTFULLY SUBMITTED:



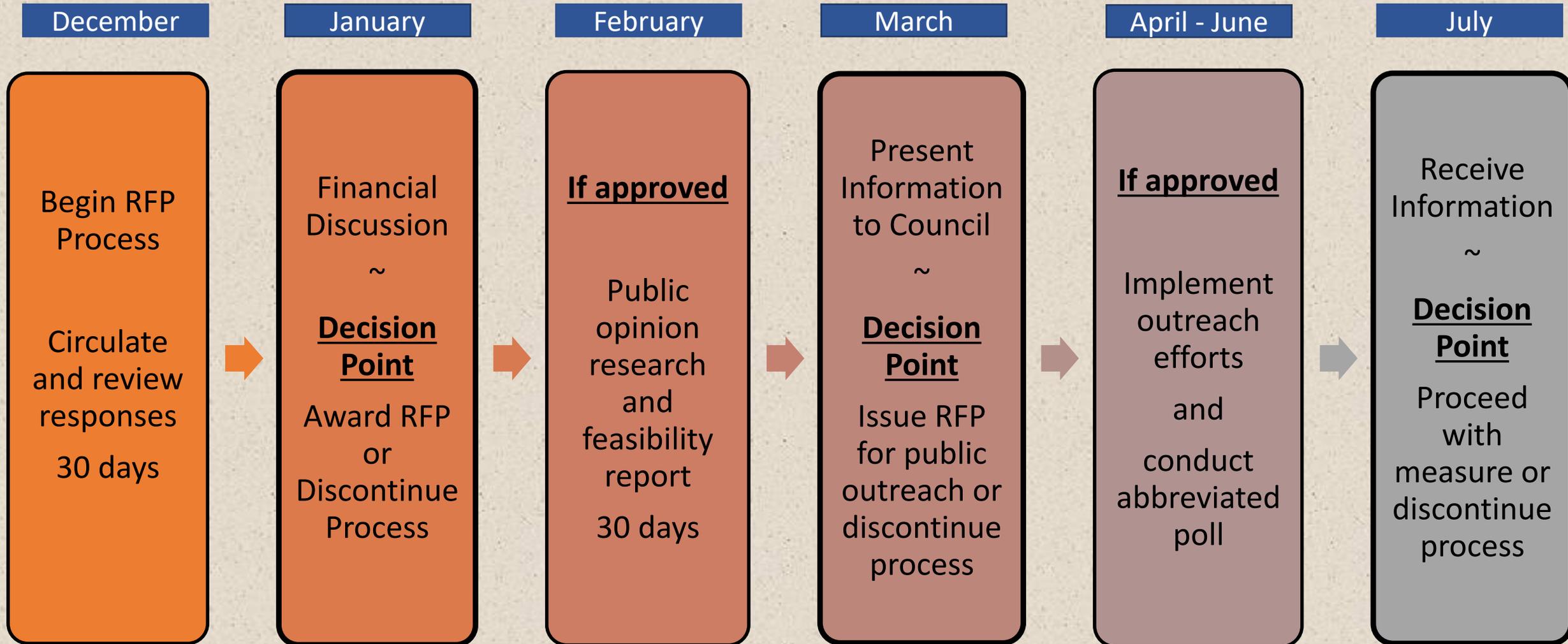
Tori Hannah
Administrative Services Director

REVIEWED BY:



Ben Harvey
City Manager

Sample Revenue Measure Milestones





CITY OF PACIFIC GROVE FINANCE DEPARTMENT

REQUEST FOR PROPOSAL FOR PUBLIC OPINION RESEARCH

Request for proposal for Public Opinion Research in Pacific Grove, CA

PROPOSAL SUBMITTAL DEADLINE:

DATE: January 12, 2018

TIME: 5:00 pm

LOCATION: City of Pacific Grove, Finance Department

PROJECT MANAGER: Tori Hannah, Administrative Services Director

CITY OF PACIFIC GROVE
CITY HALL
300 FOREST AVENUE
PACIFIC GROVE, CA 93950
(831) 648-3181

TITLE: Request for proposal for Public Opinion Research

The City hereby requests proposals for Public Opinion Research (hereinafter "Project").

This Request for Proposal (RFP) describes the general rules for preparing and submitting proposals and the City's requirements for Public Opinion Research.

I. General Information about City of Pacific Grove

Pacific Grove, population of 15,545, shares borders with the Monterey Bay, the City of Monterey, the Pacific Ocean, and the Del Monte Forest. Pacific Grove is approximately 2.86 square miles and 55.2 miles in streets length. The City is known for small-town hospitality and friendliness in a place we simply call "P.G." The City of Pacific Grove website is www.cityofpacificgrove.org

II. Background

While the City of Pacific Grove continues to recover from the recession, it is still facing fiscal challenges. Due to the implementation of cost-savings measures, the City has deferred capital improvement and technology projects. In addition, like many municipalities in California, the City is confronted with rising pension costs. This City is considering placing a general tax measure on the November 2018 ballot. One of the revenue options being considered includes a transient occupancy tax measure. Staff is currently working to schedule a special meeting in January to further evaluate the City's financial trends and discuss a potential revenue measure. It is anticipated that the meeting will take place the week of January 22, 2017. During that special meeting, a contract for public opinion services may be awarded.

The public opinion research, as outlined below, should assist in assessing any alternate revenue source, percent, and whether the initiative or any alternative would be more likely to gain public support.

III. Description and Scope of Services Needed

The goal of the public opinion research is to assist the City in evaluating the feasibility of a possible revenue ball measure in November 2018. Accordingly, in providing the City with scientifically valid survey results, the research should assess:

- How the community feels about the services provided today
- Programs or priorities that voters are most likely to support, while understanding what voters see as the biggest problems in the community
- Alternatives that are least likely to attract voter support; and identify the reasons why voters would not support a revenue measure
- Revenues that voters would most likely support. Likely candidates include transient occupancy taxes, a bifurcated revenue measure, and possibly a tax related to cannabis. The survey should also gauge how the support would change based on the rate and the level of revenue generated
- Whether a sunset provision would be needed, and the related duration
- The feasibility of success, if there another local or state revenue measure is placed on the November 2018 ballot

- Other information that will assist the City in assessing the feasibility of a possible revenue ballot measure in November 2018; and any information that would also provide support for conducting any follow-up community outreach
- The message that would be most effective in communicating the need for additional resources

If the City moves forward with the placement of a revenue measure on the November 2018 ballot, the workscope also includes assistance in developing ballot measure and ordinance language.

As part of the workscope and included in the contract price is the attendance of the consultant at a minimum of one public meeting to present and discuss its findings and recommendations. The consultant shall attend as many “working” meetings with staff as necessary in performing workscope tasks. This could include one on-site visit with staff to discuss the development of appropriate survey questions.

Project Timing

The timing of the public opinion research and any public outreach is constrained. If the measure is to be placed on the November 2018 ballot, the last day to submit a resolution to the registrar calling for an election measure for the November 2018 ballot is August 10, 2018. If the public outreach contract is approved, the City seeks to complete the initial polling effort by February 20, 2018, with a report to Council on March 7, 2018. It is anticipated at the March 7, 2018 Meeting, the City would make a decision as to whether they should proceed with outreach efforts. Based on this information and any abbreviating polling, the City would like to bring a report to the July 18, 2018 City Council meeting.

III. Requirements

Minimum Qualifications

To be considered for selection, vendors must demonstrate knowledge and experience in the following areas:

- Expert knowledge in California local government
- Ability to perform work in a timely and efficient manner
- Professional surveying and polling

Proposal Content and Submittal Instructions

Submittals must be received no later than 5:00 PM on Friday, January 12, 2018 and must include the following information:

1. Firm profile and qualifications including specific experience passing general tax measures in California; and the number of government agencies represented and success rate.
2. Recommended project approach and specific project steps including the use of any subcontractors and/or partners.
3. Proposed schedule of work.
4. Expectations of the type and amount of work requested of City staff to assist in the process.

5. Identification of the project manager and key staff members who will be assigned to the daily work of the project. Include the qualifications, resumes, and relevant experience for the identified team members.
6. Separate project budget and total cost of service for polling, itemized to the extent possible and including a fee schedule for additional services
7. Complete contact information for a minimum of three recent clients for whom similar services described in the RFP have been performed.
8. Mechanism used to survey the community, whether it would be phone, online survey, or other medium

Proposals can be sent electronically to the Administrative Services Director at thannah@cityofpacificgrove.org or mailed to:

Administrative Services Director
 City of Pacific
 300 Forest Avenue
 Pacific Grove, CA 93950

If submitting by mail, please ensure “Public Opinion Research RFP” is written in the lower left-hand corner of the envelope. One bound copy, plus one reproducible/faxable unbound copy should be submitted.

Proposals must be complete and submitted by the due date. Late submissions or delivery via facsimile will not be considered. The City assumes no responsibility for delays caused by delivery service. Postmarking by the due date will not substitute for actual receipt.

Schedule for Selection Process

December 15, 2017	Publication of RFP on City’s Website
January 12, 2018	RFP filing deadline
Week of January 22, 2018	Potential award of contract; the actual City Council special meeting date is pending

Evaluation and Rating Criteria

Proposals may be evaluated based upon, but not limited to, the following criteria in priority order:

- Understanding the work of the City
- Firm expertise and competence, including experience with similar projects
- Professional qualifications and experience of the key personnel assigned to the project
- References
- Proposed approach in completing the work
- Ability to work effectively with City staff and representatives
- Proposed budget

The City retains sole discretion to evaluate proposals and may make an award to the consultant the City deems to have the most responsive proposal. Receipt of proposals in response to its RFP does

not obligate the City in any way to engage any consultant and the City reserves the right to reject any or all proposals, wholly or in part, at any time, without penalty. The City shall retain the right to abandon the proposal process at any time prior to the actual execution of a contract with a consultant, and the City shall bear no financial or other responsibility in the event of such abandonment. The City reserves the right to negotiate any and all final terms and conditions including length, scope of services, and compensation of any agreements entered into.

Questions Regarding This Project

The technical point of contact for this project is Tori Hannah, Administrative Services Director. She can be reached via e-mail at thannah@cityofpacificgrove.org. Questions received and the City's responses will be posted on the City website at cityofpacificgrove.org

Changes to RFP

The City will post any changes of this RFP on the City website at cityofpacificgrove.org. Such changes become an integral part of the RFP for incorporation into any contract awarded pursuant to the RFP.

Rights to Submitted Materials

All Proposals and related correspondence, reports, charges, schedules, exhibits and other documentation submitted with this RFP will become property of the City and a matter of public record. All documents submitted in response to this request will be subject to disclosure if requested by a member of the public. There are a very limited number of narrow exceptions to these disclosure requirements.

City Agreement and Insurance Requirements

The successful proposer(s) will be required to sign a contract with the City relating to the work to be performed. Once selected, the proposer must procure and maintain insurance in accordance with the City's insurance requirements (see "Professional Services Agreement") for the duration of the contract. The cost of this insurance is the proposer's responsibility.

Reference Checks

The City of Pacific Grove reserves the right to contact any reference or any client listed in the documents for information which may be helpful to the City in evaluating the Contractor's performance on previous assignments.

General Conditions of RFP

- The City reserves the right to reject any and all proposals, to waive any informality, to request interviews of Contractor(s) prior to award and to select and negotiate the Contract services in the best interest of the City.
- The City reserves the right to accept all or part of any proposal, and to negotiate a contract for services and cost with the selected Contractor.
- The Contractor shall provide all necessary personnel, materials and equipment to perform and complete all work under this proposal.
- The Contractor shall be unbiased and vendor neutral.
- Unless otherwise stated, invoices are to be submitted to the Finance department upon delivery of service to the City. The invoice must include an itemization of all services provided,

including unit list price, net price, extensions total amount(s) due, and amounts previously paid. Agenda No. 13B, Attachment 2
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- Unless otherwise stated, payment will be made within thirty (30) days of the completion of the service, in an acceptable fashion, to the City, and receipt of invoice, whichever is later.
- The contract for the services described in the RFP should not be considered exclusive. As deemed necessary, the City reserves the right to obtain these services from any other vendor.
- Neither party shall be liable for any inability to perform its obligations under any subsequent agreement due to war, riot, insurrection, civil commotion, fire, flood, earthquake, storm or other act of nature.
- Notification of the parties shall be considered to have been constructively received when it is mailed via the United States Postal Service, e-mailed, or delivered in hand to the parties as stated in the contract.
- Proposal shall also mean quotation, bid, offer, qualification/experience statement, and services. Proposers shall also mean vendors, proposer's, bidders, or any person or firm responding to a Request for Information.
- The City reserves the right to retain all proposals for a period of 60 days for exam and comparison
- All contracts entered into by the City of Pacific Grove shall be governed by the Laws of the State of California. Any disputes shall be resolved within the venue of the State of California.
- The proposer may submit an alternative proposal or proposals that it believes will also meet the City's project objectives, but in a different way. In this case, the proposed must provide an analysis of the advantages and disadvantages of each of the alternatives, and discuss under that circumstances the City would prefer one alternative to the other(s).

Detailed Revenue Measure Calendar ⁽¹⁾

Tasks	Date	Council Action
Seek Council approval to issue public opinion polling to assess feasibility of a revenue measure RFP - Does not commit to the contract; however provides the lead time to support potentially moving forward. A discussion as to whether to move forward would occur in January	December 6, 2017	X
RFP for polling/feasibility assessment circulated	December 15, 2017	
Evaluate City finances - Review multi-year projections and reserve levels - Discussion of unmet needs - Potentially receive approval to move forward with contract (CM should be able to approve, typically under \$35,000)	January 17, 2018	X
Award contract for polling/feasibility assessment, if approved	January 22, 2018	
Results due to Council Council makes a "go or no-go decision" on outreach efforts	March 7, 2018	X
Issue RFP for Community Outreach Efforts, if approved	March 8, 2018	
Award contract for Community Outreach Efforts, if approved	April 4, 2018	X
Implement Community Outreach Efforts	April - July, 2018	
Conduct abbreviated poll to determine the effectiveness of outreach efforts	June 2018	
Resolution to Council for Measure - Council makes a "go or no-go decision" on measure - Actual due date to registrar is August 10, 2018 (Allows for one additional Council Meeting of August 1, 2018, if additional deliberations are needed)	July 15, 2018	X

(1) Calendar may be modified to reflect new information