

PLEASANT VALLEY RECREATION & PARK DISTRICT
REQUEST FOR PROPOSALS
FOR
USER FEES AND COST RECOVERY POLICY AND ANALYSIS



RFP RELEASE DATE:

THURSDAY, SEPTEMBER 2, 2021

PROPOSALS DUE:

FRIDAY, OCTOBER 8, 2021

No Later Than 5:00 PM PDT

DELIVER PROPOSALS TO:

ADMINISTRATIVE OFFICE

PLEASANT VALLEY RECREATION & PARK DISTRICT

Attn: Jessica A. Puckett, CPRP

1605 E. Burnley Street, Camarillo, CA 93010

Phone: (805) 482-1996

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NOTICE INVITING PROPOSALS FOR CONSULTING SERVICES TO PERFORM A COMPREHENSIVE FEE STUDY AND DEVELOP A COST RECOVERY POLICY

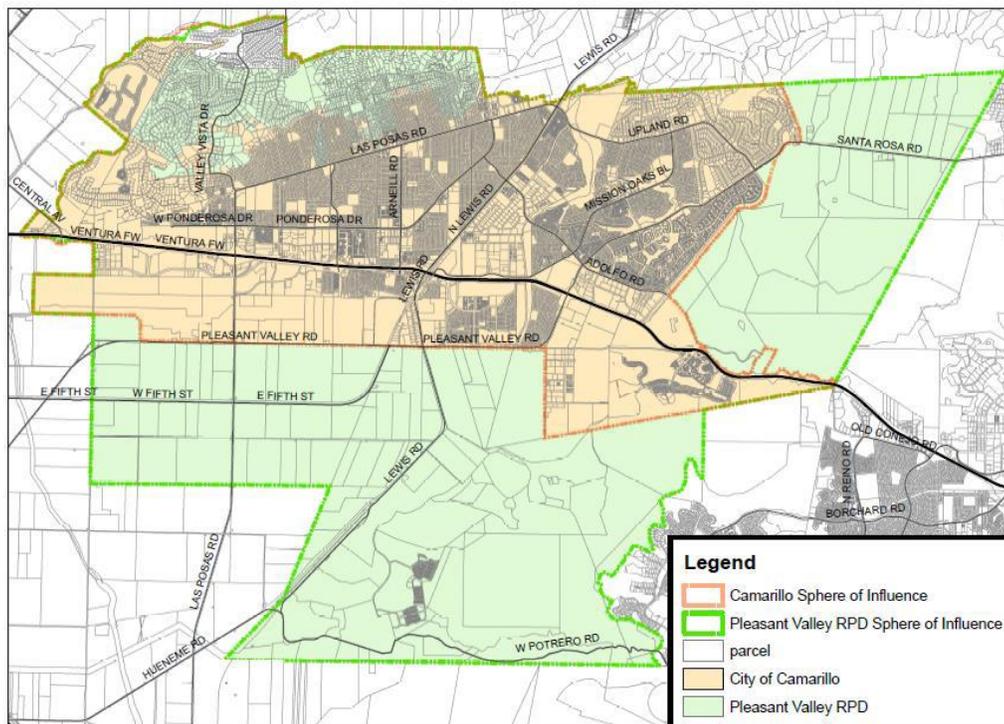
Introduction

The Pleasant Valley Recreation and Park District (“District”) is issuing this Request for Proposals (“RFP”) from experienced and qualified professional firms (“Consultant”) to perform a Full Cost Recovery Model and Policy Plan and Comprehensive Fee Study. The Fee Schedule was last updated in 2017. This project will serve as the first comprehensive or holistic fee study for the District.

District Background

The District, an independent special district, was formed in January 1962 under the State Public Resources Code of California. The birth of the District was approved by the voters in the Camarillo community to provide quality programs, parks and facilities that could be enjoyed by everyone. The District is located in and around the city of Camarillo, serves a population of over 70,000 and covers an area of approximately 45 square miles. It has grown from one park to 28 parks since its inception 59 years ago. Within the District, a variety of recreational facilities exist including: a senior center, an indoor aquatic center, a community center, dog parks, lighted ball fields, tennis and pickleball courts, a running track, walking paths, premier soccer fields, hiking trails, picnic pavilions, children’s play equipment, and barbeque areas. The City of Camarillo, incorporated in 1964, is a separate entity from the District, however, they do add recreational and cultural service value and amenities to the community by owning two small parks, a trail system and full-service library that it operates independently of the District.

Below is a map that displays the District’s and the City’s respective Spheres of Influence:



Project Goal

The goal of this project is to develop a cost recovery model and policy that provides a framework for future planning, budgeting, pricing and resource allocation for the District's parks and recreational services. The study should include, but not be limited to the following: a general review of the District's current fees, current fee methodology and allocation plan, a determination of what it costs the District to provide various services, any streamlining or changes in fees due to a shift in methodology or pricing rationale, and recommendations for adjustments to the District's fee schedule.

An interactive and holistic approach should lead to a cost recovery plan and policy that reflects the goals, mission and vision of the District. The analysis and subsequent recommendations should align available and future resources with services and commitments to include desired level of service, sustainable fiscal stewardship, and industry best practices in order to develop an implementation plan that will ensure that the District is strategically progressing to meet the needs of the community in a financially sustainable and equitable direction.

The study and plan are expected to provide justifiable, articulated and agreed upon pricing rationale that can be used to allocate resources and provide service levels that most effectively meet the community needs and aligns with the mission and vision outlined in the 2021-2026 Strategic Plan.

Project Scope

The Plan should:

- Be concise and easy-to-understand
- Utilize graphics, photos, tables, and charts as needed to convey information, in addition to logical and supporting verbiage.
- Include tangible performance measures to achieve recommendations, goals, policies, and guidelines to achieve the appropriate balance of programs and facilities. Include reference to relevant data collection methods, tools, and criteria necessary to accomplish performance measures. Identify any challenges to data collection and propose solutions.
- Address an updated and actionable Cost Recovery Plan for the District that includes any Resource Allocation and Policy that will assist in answering challenging questions from Board leadership and citizens such as:
 - Are our programs priced fairly and equitably for the District and region? Are we accommodating all citizens in the entire District who wish to access our services? Is there a methodology that addresses scholarships, fee reductions, or fee waivers to serve the community holistically?
 - How will we continue to fund Departmental facilities, services, capital, and associated resources in relationship to future budget constraints and expenditure growth?
 - Is there a methodology for the distribution of subsidy (funds used in excess of what is collected by direct fees)? If so, are we transparent?
 - Does the way we charge for services (facilities, programs, etc.) support the Departmental values, vision, and mission?

The Plan should also include measurable strategies to achieve the recommendations, goals, policies, and guidelines that will result in the appropriate balance of programs and facilities.

Overall, the steps necessary to develop the Cost Recovery Plan should include:

- Key stakeholder and staff interviews as needed (consultant to suggest quantity) to refine the project scope, purpose, uses and goals to ensure that the study will be both accurate and appropriate to the District's needs; review project schedules and answer any questions pertaining to the successful development of the analysis and Plan.
- Relevant costing and funding requirements
- Review of funding sources
- Action plan and recommended process to track ongoing cost recovery
- Performance measures and what is needed through data collection to track measures (and what are reasonable measures?)
- Reviewing existing Cost Recovery Model and analysis of direct and indirect costs and establishment of current cost recovery levels, consistent with the District's fund structure, budgeting, and any cost allocation methodologies
- Presentation of industry best practices and relevant cost recovery models acknowledging that there is no "one size fits all"
- Identified levels of service
- Engage any recommended public input processes and stakeholder engagement as it pertains to being able to establish a cost recovery plan and generation of community buy-in
- Short and long-term implementation strategies that maximizes the community's investment for critical culture, parks and recreation services and amenities
- Any recommended or proprietary software or other tools necessary to implement a Cost Recovery Plan.
- Create a final report outlining the agreed upon Plan, present fees, cost recovery targets, recommended fees, percentage changes, cost recovery percentage, revenue impact and community feedback from the process and short and long-term implementation strategies that maximizes the community's investment for critical parks and recreational services and amenities.
- Report on other matters that come to the Consultant's attention in the course of the analysis and Plan formulation that, in the Consultant's professional opinion, the District should consider.
- Participate in presentations to District staff and the District Board of Directors or other interested parties as deemed necessary by District. Collect and document comments and concerns from staff and the Board members and incorporate those comments as directed. Assist with development of staff reports, resolutions/ordinances and related presentations.
- Provide the District with an electronic copy of the final report and Plan, including any related schedules and cost documentation that can be edited and updated by District staff to accommodate changes in the organization or changes in costs.

Submission Requirements

Interested proposers must submit five (5) copies, plus an electronic version (PDF or Microsoft Word format) of the proposal on or before the deadline containing the following information to the District to be considered a viable candidate for this contract. Proposals shall not exceed 25 pages including any attachments (staff resumes do not count toward the page limit). Any proposal that does not contain the information outlined below shall not be considered.

1. Transmittal Letter to the Selection Committee

- a. The proposal must contain a transmittal letter, signed by an official authorized to commit the firm to the representations, commitments and statements contained in both the proposal and contracts. This should include the name, mailing address, email address, and phone number of the firm's primary contact person for the proposal. Firm advertising, brochures, and other promotional material should not be included.

2. Description and Qualifications of the Firm

- a. A description of the firm's organizational structure, the jurisdiction in which the firm is organized and date of such organization. In addition, provide a description of the firm's qualifications and experience on projects of similar nature to those described in the proposal as well as projects/clients where consultant has performed as an extension of staff.

3. Staffing

- a. Provide an organizational chart identifying: 1) the project manager for the work; 2) each key person who would be assigned to carry out the work, and their respective roles in performing the work. Provide a separate description of the experience and qualifications of such manager and key persons, including a summary of experience on similar projects to those described in this proposal. Resumes should be included for all key individuals as an appendix to the submittal.
 - i. The District must approve changes to key personnel committed to work on the project subsequent to award of contract.

4. References

- a. A list of no more than three (3) references for the proposer and no more than three (3) references for any subconsultants, if proposed, including the names, addresses and telephone numbers of recent clients, preferably other public agencies and a listing of the specific projects and key individuals that have participated in them. Include the dollar amount related to the participation. Identify how much experience the firm and sub consultant, if needed, has had with public agencies.
- b. A minimum of two (2) examples of past work completed within the last five (5) years that represent the type of work requested in this RFP. Examples can be representative of projects with References or from separate completed projects. Please provide a brief description of these selected projects including when the project began, its current status, a description of the proposer's role/involvement in the project, and any specific information on how the community was responsive to the project.

5. Scope of Work

- a. A clear and concise statement of the proposer's understanding of the nature and extent of the services required.

- b. Approach to the project, highlighting the methodology and process to be used, components and expected deliverables.
- c. The proposed project timeline.

6. Project Budget & Other Financial Information

- a. The proposer shall furnish the financial information requested below. If submitted by a consortium, a joint venture, a partnership, or by an individual, it shall be signed by an individual authorized to bind the firm making the proposal.
 - i. A firm must include in its proposal a complete disclosure of any alleged significant prior or ongoing contract failures, any civil or criminal litigation or investigation pending which involves the firm or in which the firm has been judged guilty or liable within the last five (5) years.
 - ii. If there is no negative history to disclose, the firm must affirmatively state in its proposal that there is no negative history to report.
 - iii. A detailed Scope of Work, including an itemization of all services to be provided and their individual costs. This should include estimated staffing, hours, costs, and a description of each major task and subtask, including public meetings.
 - iv. A schedule of hourly rates to be charged for extra work if required during the course of the contract.
 - v. A disclosure of all personal, professional or financial relationships with any officer and/or employee of the District.

Evaluation Criteria

The objective is to choose the proposal that offers the highest quality services and will achieve the project’s goals and objectives within a reasonable budget. While cost is important, other factors are also significant and the District may not select the lowest cost proposal.

All proposals submitted in response to this RFP will be evaluated by a committee in accordance with the objectives mentioned above and the following criteria with a given point value listed below.

Selection Criteria—RFP	Points Available
Understanding of Scope of Work; Recommended Methodology & Process to include High Public Engagement	25
Project Components, Timeline, and Deliverables	15
Demonstrated Expertise in Performing Similar Work	20
Qualifications and Experience of Key Staff	20
References & Past Project Samples	15
Proposed Project Cost	15
Total Points Available Per Proposal	110

Total scores will be tabulated, and the highest ranked firm will enter into negotiations. If the District requests presentations by short-listed offerors, committee members may revise their initial scores based upon additional information and clarification received in this phase. Please note that presentations have not been scheduled and are not anticipated at this time. However, if the District elects to set up interviews and your firm is invited to give a presentation to the committee, notice will be given with a set date.

Firm Selection & Notification

The issuance of this RFP and the selection of the most qualified firms is the first step in the process that will eventually lead to the execution of an agreement with the most qualified firm. Each proposal will be reviewed to determine if it meets the submittal requirements contained within this RFP.

The successful Consultant to whom work is awarded shall, within 30 days of Board approval, enter into a contract with the District for the work in accordance with the specifications and shall furnish all required documents necessary to enter into said contract.

The District reserves the right to enter into a contract without further discussion of the submitted proposal. Therefore, the proposal should be initially submitted on the most favorable terms the proposer can offer.

The District reserves the right to accept and or withdraw the RFP in whole or in part, at any time and for any reason and or request additional information from all proposers. Submission of a proposal confers no rights upon a proposer and does not obligate the District in any manner. The District also reserves the right to modify, any aspects or waive any irregularities, terminate, or delay this RFP, the RFP process, and or the program, which is outlined within this RFP at any time if doing so would serve the interest of the District. Contract award will be made at the sole discretion of the District based on evaluation of all responses.

Each proposer, by submitting a proposal, agrees that if the District accepts its proposal, such proposer will furnish all items and services upon the terms and conditions in this RFP and subsequent contract. Proposals that do not meet the mandatory requirements set forth in this RFP will be considered non-compliant. Proposers may be disqualified, and the proposal may be rejected by the District for any of, but not limited to, the following reasons:

- Failure to properly respond to the RFP;
- Evidence of collusion among the proposers submitting the proposals;
- Failure to comply with the specification requirements of the RFP.

Contract Requirements

The District plans to use the attached Pleasant Valley Recreation & Park District Professional Services Agreement. Consultants with significant concerns about the sample agreement should not submit on this RFP.

The top ranked firm will be notified in writing and will be asked to meet and submit their prospective scope of services and refine their fee (to be broken down by tasks). If after negotiation

and consideration, the District is unable to reach an acceptable agreement with the top-ranked firm, they will terminate negotiations with the top-ranked firm and, at their sole discretion, may: enter into negotiations with the second-ranked firm; withhold the award for any reason; elect not to proceed with any of the proponents; or re-solicit new Proposals.

Estimated Selection & Approval Schedule

Request for Proposals Open	September 2, 2021
Questions/Clarifications Due	September 24, 2021
Answers Provided by	October 1, 2021
Deadline for Proposals	October 8, 2021
Evaluation of Proposals	October 11-22, 2021
Announce Decision	November 4, 2021
Contract Negotiations	November 2021
Desired Project Close Out	<i>(no later than)</i> June 30, 2022

**The District reserves the right to revise the above schedule.*

Questions

Upon release of this RFP, all Consultant communications concerning the RFP should be directed to Jessica A. Puckett, CPRP, Administrative Analyst via the contact information listed below. Unauthorized contact regarding this RFP with any other District employees may result in disqualification. Any oral communications will be considered unofficial and non-binding with the District. Consultants should rely only on written statements by Ms. Puckett.

Name: Jessica A. Puckett, CPRP, Administrative Analyst
Address: Pleasant Valley Recreation & Park District
1605 E. Burnley Street, Camarillo, CA 93010
Email: jpuckett@pvrpd.org

Submittal Instructions

Proposals must be received no later than 5:00 p.m. PDT on Friday, October 8, 2021.

Proposals shall be mailed to:

Pleasant Valley Recreation & Park District
Attn: Jessica A. Puckett, CPRP
1605 E. Burnley Street
Camarillo, CA 93010

The proposals shall be in a sealed envelope or box and clearly labeled with the Consultant's name, address, and "Cost Recovery RFP."