



Request for Proposals

Consulting Services in Support of Fire Services Revenue Measure 2019

Proposal Submittal Deadline: 2:00PM on September 13, 2019
Proposal Submittal Process: email to jflores@gcsd.org and pkampa@gcsd.org
Proposed Compensation Submittal: Mail by 9/13/19 to Jennifer Flores, Administrative Services Manager, PO Box 350, Groveland, CA 95321

The Groveland Community Services District is seeking proposals from qualified consultants to provide Fire services revenue measure public polling and engagement, planning and Special Tax or Assessment Engineering services. The current schedule is for the new fire services revenue measure to be levied in the 2020/21 fiscal year.

Prospective firms are required to provide team qualification, proposed work plans and schedules, and other related items as described in this Request for Proposals. The deadline for submitting proposals is **2:00PM on September 13, 2019**.

Background

The Groveland Community Services District (GCS or District) is located in the Central Sierra due east from San Francisco in Tuolumne County, 42 miles east of Oakdale, 40 miles northeast of Mariposa, 30 miles south of Sonora and 26 miles west from the west entrance to Yosemite National Park.

The District was established in 1953 to serve the communities of Groveland and Big Oak Flat. In the 1960s and 70s, the Boise Cascade Company developed the area to the immediate northeast known as Pine Mountain Lake, potentially increasing the number of District customers twenty-fold.

The Groveland Community Services District has an area of 14.7 square miles. The current population within the District is approximately 2944 residents, and a parcel count of approximately 4452. During summer, the population swells up to over 8,000 on weekends. Population growth rate is basically non-existent. The Community Services District has no direct control over the County General Plan, which was last updated in 2018. Land Use control is a responsibility of Tuolumne County. Consistent with the County General Plan, other than infill of vacant parcels, there is limited current growth potential within the District boundaries;

however two large destination resort facilities have been developed, and two more planned. These resorts are located over 20 miles from the closest fire station, which happens to be the GCSD fire station. The District fire department responds to incidents at these resort facilities under mutual aid with the Tuolumne County Fire Department.

The Fire Department is geographically isolated in terms of close-by mutual aid. The available mutual aid response from other agencies is too far away to be of primary response use. The Priest Grade on Highway 120 leading into Groveland adds significantly to the isolation of this community. Groveland will call upon neighboring departments through the Tuolumne County mutual aid system for catastrophic, greater alarm fires or multiple-unit highway responses. This means that for fire defense, the District residents are dependent on the Groveland Fire Department deployment system to keep fires small until mutual aid can arrive.

The Groveland Fire Department started as an all-volunteer operation in the early nineteen hundreds. The citizens of Groveland formed the Groveland Community Services District in 1953. The District was successor to the Groveland Sewerage and Water District. In addition to its water and sewerage tasks, the District also added garbage collection, parks, and street lighting, as well as providing "Protection against fire." Given the strong volunteer force at that time and the small size and growth expectations of what is now the District, the leadership over the decades never anticipated the need for a tax structure to pay for many, if any, full-time, career firefighters. Long-time residents may remember this as "yesterday;" but growth occurred and Proposition 13 left special districts that relied on property taxes especially vulnerable, and the pressures on the volunteers decimated their ranks. This left the District with no choice but to start a career-staffed fire department and to ask the property owners to assess themselves to pay for it.

In 1986, the District hired its first full-time fire chief and assessed its first parcel assessment. In 1988, the District hired its first full-time firefighter and constructed Fire Station #1 on State Route 120 in the center of Groveland. In 1990, the District went back to the voters and requested a second parcel assessment. This, too, passed with a two-thirds majority and generated about \$80,000 per year from 1990-1994. The District hired its second firefighter in 1990. The District hired its first full-time engineer in 1995. By 1999, the staff was 1 fire chief, 3 engineers, and 11 volunteers. In 2000, the District increased the staffing by hiring three full-time firefighters. Using reserve funds earmarked for an engine purchase, the District purchased its first new fire engine. In 2001, the property owners approved another benefit assessment on 3502 Single Family Residential Equivalent (SFRE) which generated approximately \$250,000 annually and sunset in 2011/12. In 2012, a Special Tax measure was placed on the ballot to replace the expired assessment, which failed to achieve even a majority vote.

With only ad-valorem property taxes remaining to fund the fire department, the District chose to abolish its paid-staff department and to enter into a Schedule A contract with Calfire; initially a less expensive alternative. To meet firefighting standards and provide full 4-person staffing year round, the District also entered into an "Amador" contract with Calfire to pay the cost of

non-fire season staffing at the Calfire station within the GCSD boundaries. The current cost of the Calfire Schedule A and Amador contracts alone total in excess of the ad valorem property taxes received for the Department; not including operating costs or equipment/apparatus replacement. Approximately \$400,000 annually in increased revenue is needed to balance the budget, and another \$200,000 annually to fund the equipment/apparatus replacement needs of the department. The GCSD Fire Fund balance is estimated to be depleted by June 30, 2021 unless additional revenue is raised.

Revenue Measure Consulting Services Goals and Objectives

The goals of this consulting work in development of the Fire Department Revenue Measure are to:

1. Develop a funding measure or measures with the highest degree of potential success for being approved by the voters or property owners
2. Provide a long term funding source for the department, adequate to fund operations and equipment replacement

The project objectives, anticipated efforts and deliverables include, but are not limited to:

1. Evaluate the history of the District fire department and its revenue sources, associated successes and failures
2. Understand the voter and property owner makeup in terms of what type of measure they will be most likely to support
3. Conduct the polling necessary, in cooperation with the polling firm hired by Tuolumne County (for the same purposes) to advise the GCSD Board of Directors on the likelihood of support of a fire revenue measure, and its acceptable amount
4. Quickly develop recommendations to the GCSD Board of Directors on the type and schedule for the revenue measure(s)
5. Develop public engagement and measure outreach processes and documents
6. Prepare supporting memoranda and submittals for Board consideration of items, and prepare draft notices, resolutions and ballot language for review by District counsel

Scope of Work

The consultant will be required to evaluate and make recommendations regarding the fire department revenue measure type and amount with the highest potential for voter approval; according to a schedule that allows the District to levy the tax or assessment in the 2020/2021 fiscal year. The consultant will first establish a public engagement process with the intent of developing broad public support for the measure. The consultant will gather the information necessary to make a solidly supported funding measure type and schedule recommendation to the GCSD Board. Once the desired revenue measure type is approved by the Board, the consultant will assist the workgroup, Board and staff in preparing outreach methods and assist in the preparation and review of related materials, and attend working group or Board committee meetings. The consultant will fully prepare the District Board for approval of the

measure, and to submit the measure for election. Legal review of resolutions, notices and ballot measure language will be provided by District counsel.

The anticipated work scope includes:

1. Preparation of a summary report of the findings associated with public polling
2. Development of a recommendation to the Board regarding the appropriate revenue measure type to prepare and advance to the voters for approval; and
3. Development of the tax application methodology and/or benefit assessment methodology for Board approval; and
4. Prepare the assessment engineer's report if this revenue option is chosen; and
5. Assistance in public outreach and engagement process development for a successful measure; and
6. Prepare the draft ballot language and assist with the voting process as appropriate

Services to be Provided by Consultant

1. **Review existing plans, budgets, assessment reports and related documents.**
2. **Attend Meetings.** Attend a kick-off meeting with a Board Committee and District staff to begin the project. Initial recommendations will be made by Consultant at this meeting regarding the identification, orientation and role of a community based working group. Meet or confer with District and Calfire staff as needed. Attend three meetings of the Fire Funding Workgroup and/or Board Ad-hoc Committee. Attend two meetings of the Board of Directors to support the recommended revenue measure type and to present the measure's cost application methodology and final ballot language.
3. **Conduct Analysis.** Conduct the necessary analysis of zoning, property types, land use, occupancies, incidents and response rates and types, response trends and other data to devise the appropriate application methodology.
4. **Prepare Report on Revenue Measure options, considerations, schedule and estimated revenue generation.**
 - a. Prepare and submit draft revenue measure options and supporting documentation to staff/working group for review.
 - b. Prepare final draft revenue measure options and recommendation report to the Board for approval.
5. **Prepare Draft Ballot Measure Language and Assist in Drafting the Supporting Board Resolution and Staff Submittal.**
 - a. For an Assessment District Formation, prepare the required Assessment Engineer's Report.
 - b. Conduct or assist the District in conducting a mail (assessment) ballot measure

process

6. **Time Schedule.** Supply a time schedule for the consultant's recommendations and Board approval of the desired revenue measure type, Board approval of the measure and the voting process. The revenue measure must be approved by the voters in time for levy on the 2020/21 tax rolls.
7. **Public Relations and Outreach.** Provide a draft recommended procedure for public engagement in development of the revenue measure and a draft recommended measure outreach strategy. Develop one draft press release and one draft informational flyer summarizing the evaluation, findings and recommendations of the measure, its importance and implications of its success and failure, as appropriate.

Services to be Provided by the District

The services to be provided by the District include, but are not necessarily limited to the following:

1. **Furnish Data.** Furnish all reasonably available records and information, including reports, budgets and audits, projected future revenue and expenses, related Board and public presentations, entities and groups for engagement.
2. **Master Plans.** Provide electronic or paper copies of Master Plans or other documentation prepared by the District's current Fire Master Plan/Development Impact Evaluation Consultant.
3. **Customer and Property Owner Data.** Provide customer lists, and lists of property owners.
4. **Staff Support.** Coordinate work group, Board and/or Committee meetings, staff meetings, provide staff submittals for Board meeting action items, provide for legal review of methodologies and ballot language as necessary, support and assistance as required and agreed to in advance of the study.

Proposal Content and Requirements

The District welcomes a response to this request for proposals (RFP) in any format that best expresses the consultant's qualifications, approach to the project, and proposed scope of services. Proposals submitted in response to this RFP must include the following items:

1. **Statement of Qualifications** - Section A of the Proposal shall consist of a statement of qualifications. Identify the individuals who will be responsible for directly conducting and preparing the evaluation and recommendations. Describe the background and experience of the individuals who will actually perform the services including individual experience in polling, conducting surveys and preparing reports for similar projects.

Provide a list of five similar revenue measures that your firm has undertaken. For each project please list the following:

- Project name, location, population served by the entity and other relevant information to determine the comparability with the GCSD funding measure.
- Detailed description of the services performed, and the time period in which they were performed, and whether the measure was approved by the voters.
- The name and telephone number of at least one reference for the project that can attest to the quality and effectiveness of the Consultant's work.

The statement of qualifications including resumes of individuals shall be limited to ten (10) pages.

2. Methodology and Approach - Section B of the Proposal shall describe the methodology and approach that the Consultant will use to perform the requested services, and develop the desired report and recommendations. At a minimum the proposal should include the following:

- A description of the step by step process that the consultant will utilize to evaluate the appropriate revenue measure type, conduct polling, the methods to be used to engage and inform the public, and how the measure application methodology will be determined.
- A list of the proposed tasks and the effort proposed to be devoted to each.
- A schedule of milestones and tasks, and estimated dates of completion for each task.

Selection of Consultant

A consultant selection committee will assess and rate the Consultants' proposals based upon the following criteria:

- Responsiveness to the RFP
- Qualifications of individuals to be assigned to this project
- Experience and demonstrated success of the Consultant in preparing similar revenue measures for entities located in rural communities
- Success of consultant's other revenue measures in receiving voter approval
- Evidence that the Consultant understands the project purpose and requirements
- Consultant's approach to the project
- Evidence of the Consultant's ability to design public engagement processes and to produce (or assist in producing) well-written outreach materials
- Demonstration of commitment to project and ability to deliver the finished product on time

The consultant(s), which the District in its sole discretion, has determined to be the most qualified to perform the work will be identified as the top-rated consultant. A contract will be negotiated with the highest rated proposer. If agreement cannot be reached, negotiations with

other proposers, in order of their respective final ratings will be conducted until tentative agreements can be reached. The draft negotiated agreement will be presented to the Board of Directors for their approval in September 2019.

The District anticipates that a Consultant will be selected in September of 2019, and that a contract for services will be negotiated and executed within a month thereafter. The consultant will be expected to commence services immediately upon execution of the District's Standard Consultant Services Agreement.

Proposed Compensation

The Consultant shall provide, **in a separately sealed and clearly marked envelope**, the estimated cost to be charged to the District by task **and subtask**, and a total proposed project cost. The cost proposal shall identify the hourly rates and include direct labor costs and expenses including travel and other direct costs. The cost proposal shall separately identify the following as tasks:

1. Public Polling
2. Special Tax Measure recommendation and development
3. Benefit Assessment District creation and engineer's report preparation
4. Public Engagement and Outreach process development

Cost proposals will not be opened until after each firm has been ranked and the firm deemed most qualified has been selected. The cost proposal for the selected firm will form the basis of negotiations for the contract.

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