

CITY OF CARPINTERIA
REQUEST FOR PROPOSAL
TO PROVIDE
CONSULTING PROGRAM DESIGN AND IMPLEMENTATION SERVICES
FOR
ESTABLISHMENT OF AN ACTIVE ADULT / SENIOR CENTER & RELATED PROGRAMMING



JUNE 2023

Proposals must be submitted via email, in PDF format, to:
Michael Ramirez, Assistant City Manager, MichaelR@carpinteriaca.gov

Submission Deadline: 10:00 p.m., Sunday, August 27, 2023

TABLE OF CONTENTS

INTRODUCTION	1
BACKGROUND	1
PROPOSAL SUBMISSION INSTRUCTIONS	1
SCOPE OF SERVICES	2
PROJECT DELIVERABLES.....	2
PROPOSAL REQUIREMENTS.....	3
PREFERRED EXPERIENCE & QUALIFICATIONS	4
EVALUATION CRITERIA.....	4
RIGHT TO REJECT ANY OR ALL PROPOSALS	5
INSURANCE REQUIREMENTS	6
WORKERS' COMPENSATION REQUIREMENTS	10

INTRODUCTION

The City of Carpinteria (City) is requesting proposals from qualified organizations to provide consulting Program Design and Implementation services for establishment of an Active Adult / Senior Center and related programming (Project). The consulting services will be administered by the General Government Department and under the supervision of the Assistant City Manager. The award will be made to the most qualified firm / organization based on the responsiveness to this Request for Proposal (RFP).

BACKGROUND

At the City Council Special Meeting, *Workshop on 2022 Draft Work Plan*, held on January 22, 2022, staff was directed by City Council to research and provide interim and long-term options for the establishment of a senior center and senior programming.

At the City Council Meeting on March 14, 2022, staff provided City Council with a variety of interim and long-term options for the establishment of a senior center and senior programming. City Council received the report and directed staff to bring back specific options developed with feedback from the community.

On April 25, 2022, City Council adopted Resolution No. 6127 authorizing the creation of an Ad Hoc Senior Services Planning Committee. The purpose of the committee was to assist staff with the creation, distribution, and collection of data through a Community Needs Assessment, or similar tool or process, with the purpose of providing City Council with data-supported recommendations for the provision of senior services.

Working collaboratively with stakeholders and City staff, the Ad Hoc Senior Services Planning Committee created an 18-question survey, and nearly 400 surveys were collected.

On November 28, 2022, staff presented City Council with recommendations for the establishment of active adult / senior programming services supported by data collected through the aforementioned survey. To further refine staff recommendations and develop an actionable plan for implementation, City Council directed staff to continue to work through the Ad Hoc Senior Services Planning Committee.

For access to detailed staff reports and results from the survey, visit www.carpinteriaca.gov/seniors

PROPOSAL SUBMISSION INSTRUCTIONS

Proposals must be submitted via email, in PDF format, to the address provided on the cover of this RFP by the date and time listed. The email subject line should be listed as follows:

“Consulting Program Design and Implementation Services Proposal”

The name and address of the firm / organization shall appear in the body of the email. **All emails will receive notice of receipt within one business day.** If you do receive a notice of receipt, your

proposal was not received and you must contact City Hall prior to the submission deadline at 805-684-5405 for further instruction.

Proposal in the form of telephone calls, facsimiles, or regular mail will not be accepted.

LATE PROPOSALS WILL NOT BE ACCEPTED.

Questions

All questions regarding this RFP must be submitted via email to the following contact:

Michael Ramirez, Assistant City Manager
City of Carpinteria
General Government Department
MichaelR@carpinteriaca.gov

Questions must be submitted at least four (4) days before the proposal deadline. Questions submitted after this time will not be responded to.

SCOPE OF SERVICES

To research and provide detailed analysis on short- and long-term options for deliverance of active adult and senior services in Carpinteria, reflecting best practice and feedback from community stakeholders.

Optional Add-in *(must be shown as a separate line item when listing total project cost)*

Provide temporary programming support, including but not limited to, program administration, and coordination of activities, volunteers, and scheduling. Approximately 5 to 10 hours per week.

PROJECT DELIVERABLES

- List of viable and fully vetted locations for programming hub, with ranked recommendations, based on needs (e.g., space, accessibility, affordability, etc.), stakeholder feedback, and other important factors such ability to expand, opportunities for partnership, and space types. Must include detailed rationale and cost-benefit analysis.
- Conduct feasibility study to identify and provide potential funding sources for initial launch and ongoing funding for three years; align feasibility study with recommended strategies and programming.
- Develop realistic options with recommendations and rationale for organizational structure, including an assessment of capacity for oversight and management of a senior center (i.e., City sponsored and managed, public/private partnership, program of an existing nonprofit organization, newly created nonprofit.)

- Engage, cultivate, and provide a list of local and regional senior serving organizations and other potential program partners, indicating opportunities for programmatic collaboration and resource sharing.
- Develop and provide staffing recommendations based on projected participation/membership levels and programmatic activities for the first three years.
- 3-year action plan for implementation.
- Develop budget models based on a three-year timeline that are aligned with recommended organizational structure and activities, including funds needed for initial launch.
- Design an outreach strategy, or strategies, to educate and engage potential program participants (for implementation by future program staff.)

PROPOSAL REQUIREMENTS

The proposal shall demonstrate the qualifications, competence, and capacity of the Consultant to provide the services in accordance with the requirements of this RFP. The proposal shall specify an approach that will meet the RFP requirements.

The proposal shall contain the information as set forth in this section. Failure to include this information, or an incomplete response, may be cause for disqualification. The proposals will be used to evaluate and select the most qualified firm / organization/s.

The proposal shall include the following information as a minimum:

- ✓ Transmittal cover letter signed by the person or persons authorized to represent the firm / organization.
- ✓ Executive summary.
- ✓ The firm / organization's name, background, and contact person, including office address, city, state, zip code, telephone number, email address, web site address (if any.)
- ✓ All existing and past financial relationships including agreements between the firm / organization and proposed subconsultants, with current Members of the City Council and City staff, and entities for which said members are employed, or have an interest, both past and present. If there are none, the proposal shall clearly state this. The Members of the City Council can be viewed at <https://carpinteria.ca.us/city-hall/city-council/>.
- ✓ Descriptions of the proposed service organization and specific experience and capabilities of the personnel related to the scope of services. Include licenses and affiliations, if any. Résumés for personnel shall be included and attached separately in an appendix to the proposal. Copies of résumés will not count as part of the page limitation.
- ✓ At least three (3) relevant contacts to serve as references.
- ✓ A summary of the firm / organization's approach to the services. Address the scope of services as presented, but include other approaches, items, or considerations; or exceptions and additions. The approach should demonstrate a thorough understanding of the issues that may be anticipated in the services.

- ✓ Project timeline, including objectives, important milestones, and estimated completion dates.
- ✓ Estimated hours for each major task including those of all subconsultants to complete the scope of services. If tiered subconsultants are part of the project organization, they shall be listed under the task performed.
- ✓ Number of hours required per person to complete each project objective, with proposed hourly rate/s and total project cost.
- ✓ Proposed payment schedule.

The proposal shall be a maximum of twenty (20) pages.

A proposal may be amended only if the City receives such amendment before the deadline stated herein for receiving proposals.

A proposal may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the proposal.

PREFERRED EXPERIENCE & QUALIFICATIONS

- Thorough understanding of organizational structure, capacity, and program design and implementation.
- 5 or more years of experience in the field of senior recreation.
- Applicable experience and knowledge of the Carpinteria community, local area assets, and regional organizations serving seniors.
- Demonstrated ability to collect and analyze quantitative and qualitative data, and produce research-based recommendations.
- Demonstrated ability to identify applicable funding sources and determine feasibility for support of active adult and senior services in Carpinteria.
- Experience planning and writing grant proposals.
- Experience developing and managing fundraising campaigns.
- Experience in the public and/or nonprofit sectors, or as an organizational development specialist is highly desirable.

EVALUATION CRITERIA

From the proposals received, the City will select the three (3) highest rated firm / organizations for interviews. Evaluation of the proposals including the interviews will be based on the following criteria:

1. The Consultant's qualifications and ability to perform the work as outlined above based on information provided by the Consultant and client references. [25 Points]
2. The Consultant's key personnel and subconsultant's qualifications, knowledge of local conditions and ability to perform the work as outlined in the RFP, based on information provided by the Consultant. [25 Points]

3. The Consultant's responsiveness and availability to City staff, and the ability of the Consultant's key personnel to effectively and efficiently complete the project. [20 Points]
4. The Consultant's understanding of the Project as demonstrated by its approach, the proposal's responsiveness to the RFP and project needs, and its demonstrated ability to meet the Project schedule. [20 Points]
5. Based on client references, the Consultant's performance on similar projects. [10 Points]

The successful firm / organization is required to obtain insurance, as set forth in Exhibit A, with an insurer or insurers that are satisfactory to the City. Failure to meet the insurance requirements will result in the Consultant's disqualification. By signing and submitting a proposal, the Consultant is certifying that it has reviewed the City's insurance coverage requirements, and that the said insurance coverages will be obtained and be in force upon execution of the Agreement with the City. The successful firm / organization shall submit a completed certificate of insurance with the signed Agreement.

Failure to respond to the RFP requirements will result in the disqualification of the proposal as non-responsive to the RFP.

The tentative schedule for selection is as follows:

Proposals Due	Sunday, August 27, 2023
Interviews	September, September 4, 2023
Selection	Friday, September 8, 2023

RIGHT TO REJECT ANY OR ALL PROPOSALS

The City reserves the right to reject any or all proposals or to select the proposal most advantageous to the City. The City reserves the right to verify all information submitted in the proposal. The City reserves the right to amend the RFP or issue a notice of amendment. The City reserves the right to reject any and all proposals and to waive any informality, irregularity, or technicality in any proposal. The posting of this RFP is not a guarantee that services will be purchased by the City.

The City may reject a proposal from any firm / organization who previously failed to perform properly, or complete on time, contracts of similar nature, or to reject a proposal from the firm / organization who is not in a position to perform such a contract satisfactory. The City may reject a proposal from any firm / organization who is in default of payment of taxes, licenses, or other monies due to the City.

No compensation will be made for the cost of preparing any proposal. All submitted materials of a proposal will become the property of the City. The City will retain all proposals submitted and may use any idea in a proposal regardless of whether that proposal is selected.

Evaluations of the proposals will be available for public inspection at the conclusion of the selection process.

Submission of a proposal constitutes acceptance of the conditions contained in the RFP unless clearly and specifically noted in the proposal submitted and confirmed in the Agreement.

INSURANCE REQUIREMENTS

Prior to the beginning of and throughout the duration of the Work, Consultant will maintain insurance in conformance with the requirements set forth below. Consultant will use existing coverage to comply with these requirements. If that existing coverage does not meet the requirements set forth here, Consultant agrees to amend, supplement or endorse the existing coverage to do so. Consultant acknowledges that the insurance coverage and policy limits set forth in this section constitute the minimum amount of coverage required. Any insurance proceeds available to City in excess of the limits and coverage required in this agreement and which is applicable to a given loss, will be available to City.

Consultant shall provide the following types and amounts of insurance:

Commercial General Liability Insurance using Insurance Services Office "Commercial General Liability" policy form CG 00 01 or the exact equivalent. Defense costs must be paid in addition to limits. There shall be no cross-liability exclusion for claims or suits by one insured against another. Limits are subject to review but in no event less than \$1,000,000 per occurrence.

Business Auto Coverage on ISO Business Auto Coverage form CA 00 01 including symbol 1 (Any Auto) or the exact equivalent. Limits are subject to review, but in no event to be less than \$1,000,000 per accident. If Consultant owns no vehicles, this requirement may be satisfied by a non-owned auto endorsement to the general liability policy described above. If Consultant or Consultant's employees will use personal autos in any way on this project, Consultant shall provide evidence of personal auto liability coverage for each such person.

When applicable, Workers Compensation on a state-approved policy form providing statutory benefits as required by law with employer's liability limits no less than \$1,000,000 per accident or disease.

Excess or Umbrella Liability Insurance (Over Primary) if used to meet limit requirements, shall provide coverage at least as broad as specified for the underlying coverages. Any such coverage provided under an umbrella liability policy shall include a drop-down provision providing primary coverage above a maximum \$25,000 self-insured retention for liability not covered by primary but covered by the umbrella. Coverage shall be provided on a "pay on behalf" basis, with defense costs payable in addition to policy limits. Policy shall contain a provision obligating insurer at the time insured's liability is determined, not requiring actual payment by the insured first. There shall be no cross-liability exclusion precluding coverage for claims or suits by one insured against another. Coverage shall be applicable to City for injury to employees of Consultant, subconsultants or others involved in the Work. The scope of coverage provided is subject to approval of City following receipt of proof of insurance as required herein. Limits are subject to review but in no event less than \$1,000,000 per occurrence.

Professional Liability or Errors and Omissions Insurance as appropriate shall be written on a policy form coverage specifically designed to protect against acts, errors or omissions of the consultant and "Covered Professional Services" as designated in the policy must specifically include work performed under this agreement. The policy limit shall be no less than \$1,000,000 per claim and in the aggregate. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend. The policy retroactive date shall be on or before the effective date of this agreement.

Insurance procured pursuant to these requirements shall be written by insurers that are admitted carriers in the state of California and with an A.M. Best rating of A- or better and a minimum financial size VII.

General conditions pertaining to provision of insurance coverage by Consultant. Consultant and City agree to the following with respect to insurance provided by Consultant:

1. Consultant agrees to have its insurer endorse the third-party general liability coverage required herein to include as additional insureds City, its officials, employees, volunteers and agents, using standard ISO endorsement No. CG 2010-0413. Consultant also agrees to require all contractors and subcontractors to do likewise.
2. No liability insurance coverage provided to comply with this Agreement shall prohibit Consultant, or Consultant's employees or agents, from waiving the right of subrogation prior to a loss. Consultant agrees to waive subrogation rights against City regardless of the applicability of any insurance proceeds, and to require all contractors and subcontractors to do likewise.
3. All insurance coverage and limits provided by Contractor and available or applicable to this agreement are intended to apply to the full extent of the policies. Nothing contained in this Agreement or any other agreement relating to the City or its operations limits the application of such insurance coverage.
4. None of the coverages required herein will be in compliance with these requirements if they include any limiting endorsement of any kind that has not been first submitted to City and approved of in writing.
5. No liability policy shall contain any provision or definition that would serve to eliminate so-called "third party action over" claims, including any exclusion for bodily injury to an employee of the insured or of any contractor or subcontractor.
6. All coverage types and limits required are subject to approval, modification and additional requirements by the City, as the need arises. Consultant shall not make any reductions in scope of coverage (e.g., elimination of contractual liability or reduction of discovery period) that may affect City's protection without City's prior written consent.
7. Proof of compliance with these insurance requirements, consisting of certificates of insurance evidencing all of the coverages required and an additional insured endorsement to Consultant's general liability policy, shall be delivered to City at or prior to the execution of this Agreement. In the event such proof of any insurance is not delivered as required, or in the event such insurance is canceled at any time and no replacement coverage is provided, City has the right, but not the duty, to obtain any insurance it deems necessary to protect its interests under this or any other agreement and to pay the premium. Any premium so paid by City shall be charged to and promptly paid by Consultant or deducted from sums due Consultant, at City option.
8. Certificate(s) are to reflect that the insurer will provide 30 (thirty) days' notice to City of any cancellation of coverage. Consultant agrees to require its insurer to modify such certificates to delete any exculpatory wording stating that failure of the insurer to mail written notice of cancellation imposes no obligation, or that any party will "endeavor" (as opposed to being required) to comply with the requirements of the certificate.

9. It is acknowledged by the parties of this agreement that all insurance coverage required to be provided by Consultant or any subcontractor, is intended to apply first and on a primary, non-contributing basis in relation to any other insurance or self-insurance available to City.
10. Consultant agrees to ensure that subcontractors, and any other party involved with the project who is brought onto or involved in the project by Consultant, provide the same minimum insurance coverage required of Consultant. Consultant agrees to monitor and review all such coverage and assumes all responsibility for ensuring that such coverage is provided in conformity with the requirements of this section. Consultant agrees that upon request, all agreements with subcontractors and others engaged in the project will be submitted to City for review.
11. Consultant agrees not to self-insure or to use any self-insured retentions or deductibles on any portion of the insurance required herein and further agrees that it will not allow any contractor, subcontractor, Architect, Engineer or other entity or person in any way involved in the performance of work on the project contemplated by this agreement to self-insure its obligations to City. If Consultant's existing coverage includes a deductible or self-insured retention, the deductible or self-insured retention must be declared to the City. At that time the City shall review options with the Consultant, which may include reduction or elimination of the deductible or self-insured retention, substitution of other coverage, or other solutions.
12. The City reserves the right at any time during the term of the contract to change the amounts and types of insurance required by giving the Consultant ninety (90) days advance written notice of such change. If such change results in substantial additional cost to the Consultant, the City will negotiate additional compensation proportional to the increased benefit to City.
13. For purposes of applying insurance coverage only, this Agreement will be deemed to have been executed immediately upon any party hereto taking any steps that can be deemed to be in furtherance of or towards performance of this Agreement.
14. Consultant acknowledges and agrees that any actual or alleged failure on the part of City to inform Consultant of non-compliance with any insurance requirement in no way imposes any additional obligations on City nor does it waive any rights hereunder in this or any other regard.
15. Consultant will renew the required coverage annually as long as City or its employees or agents face an exposure from operations of any type pursuant to this Agreement. This obligation applies whether or not the Agreement is canceled or terminated for any reason. Termination of this obligation is not effective until City executes a written statement to that effect.
16. Consultant shall provide proof that policies of insurance required herein expiring during the term of this Agreement have been renewed or replaced with other policies providing at least the same coverage. Proof that such coverage has been ordered shall be submitted prior to expiration. A coverage binder or letter from Consultant's insurance agent to this effect is acceptable. A certificate of insurance and/or additional insured endorsement as required in these specifications applicable to the renewing or new coverage must be provided to City within five days of the expiration of the coverages.
17. The provisions of any workers' compensation or similar act will not limit the obligations of Consultant under this Agreement. Consultant expressly agrees not to use any statutory immunity defenses under such laws with respect to City, its employees, officials and agents.

18. Requirements of specific coverage features or limits contained in this section are not intended as limitations on coverage, limits or other requirements nor as a waiver of any coverage normally provided by any given policy. Specific reference to a given coverage feature is for purposes of clarification only as it pertains to a given issue and is not intended by any party or insured to be limiting or all-inclusive.
19. These insurance requirements are intended to be separate and distinct from any other provision in this agreement and are intended by the parties here to be interpreted as such.
20. The requirements in this Section supersede all other sections and provisions of this Agreement to the extent that any other section or provision conflicts with or impairs the provisions of this Section.
21. Consultant agrees to be responsible for ensuring that no contract used by any party involved in any way with the project reserves the right to charge City or Consultant for the cost of additional insurance coverage required by this agreement. Any such provisions are to be deleted with reference to City. It is not the intent of City to reimburse any third party for the cost of complying with these requirements. There shall be no recourse against City for payment of premiums or other amounts with respect thereto.
22. The City's failure to comply with reporting requirements should not affect coverage required under the Agreement.
23. The consultant's insurance is primary to that of any insurance claimed by the City.

Consultant agrees to provide immediate notice to City of any claim or loss against Consultant arising out of the work performed under this agreement. City assumes no obligation or liability by such notice, but has the right (but not the duty) to monitor the handling of any such claim or claims if they are likely to involve City.

WORKERS' COMPENSATION REQUIREMENTS

The Consultant is required to sign and file either a statement acknowledging its obligation to secure payment of Workers' Compensation before beginning work, or a declaration confirming that as a sole proprietor consultant is exempt from Workers' Compensation Requirements.

ACKNOWLEDGEMENT OF WORKERS' COMPENSATION OBLIGATION

I, _____, hereby acknowledge my obligation to secure payment of Workers' Compensation before beginning work.

FIRM / ORGANIZATION

By: _____

Name and Title of Signatory

Dated: _____