



## REQUEST FOR PROPOSAL

### Citizen Priorities and Strategic Planning

Thurston County, Washington

Issue Date: June 15, 2017

Due Date: July 17, 2017

Thurston County Board of County Commissioners  
Building 1, Room 269  
2000 Lakeridge Drive SW  
Olympia, WA 98502

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## Section 1: Overview

Thurston County seeks to retain a qualified firm to conduct a citizen survey on their priorities for Thurston County government, including spending priorities, and to facilitate a strategic planning process and assist in the development of an updated Strategic Plan for 2019 – 2023. The County’s objective is to update the existing Strategic Plan to ensure it is in line with the ever-changing environment and the priorities of the citizens of Thurston County, and to align the county budget to those priorities as much as practical. At the same time, deference should be paid to the work and input sought in the development of the current document.

The Board County Commissioners have established a new Mission and Vision for the County:

### VISION

Thurston County is a vibrant community ensuring the health, safety and wellbeing of generations to live, work and play.

### MISSION

To create a community that promotes health, commerce and environmental protection with transparency and accountability.

The County has four primary objectives:

1. To communicate the new Mission and Vision to county citizens, and receive their input on priorities for County programs and spending.
2. To refresh and establish the County’s strategic goals and objectives in alignment to the new Mission and Vision.
3. To identify strategic initiatives (projects) and operational plans to achieve the goals.
4. To develop strategic measurements that will demonstrate to the County Commissioners, employees, and to the public progress towards achieving the vision.

### About Thurston County

Thurston County serves over 265,000 residents in the south Puget Sound region of Washington State. There are ten elected offices (including courts) and seven county departments that administer the day to day operations of the county. An elected three-member Board of County Commissioners is the primary policy-making body, exercising budgetary and financial oversight of the county. The county operates in a decentralized manner.

The county has an annual budget of approximately \$300 million, with about 75 appropriated funds. It has approximately 1,000 employees. Elected official offices and non-elected appointed director departments each have separately appropriated budgets. Services include public safety (sheriff, judicial and emergency services), construction and maintenance of roads and bridges, sanitation facilities, health and social services, environmental sustainability programs, culture and recreational facilities and activities, water quality, flood control, planning and zoning, building permit and general administrative services.

## **Section 2: Scope of Services and Major Deliverables**

Major components of the scope of services include:

1. Develop educational materials regarding County programs and budgets for use in public surveys and forums.
2. Assess public opinions and priorities for County programs and spending through surveys, polls, forums, on-line tools or other methods.
3. Produce a report with statistically valid data regarding citizen priorities.
4. Work with County Commissioners and the senior management team to develop goals, objectives with intended results, and operational plans to achieve the goals, all in alignment with the new mission and vision and with the priorities of citizens.
5. Develop strategies and/or tools to provide staff and Commissioners with visual marking of progress on specific operational plans. Metrics will show progress towards objectives defined in step 1. The tools should be designed so County staff can maintain them internally for future data updates.
6. Create a communication plan to share the progress internally and externally.

At a minimum, the successful contractor will provide the following deliverables:

### For Citizen Priorities for the County:

1. A schedule for regular meetings with the Consultant and the County's senior managers and budget team to ensure consistency in planning and coordination of all components of the analysis, including a kick-off meeting and a final presentation.
2. A detailed project action plan, including a timeline of all stages in the scope of services, and a proposed breakdown of roles and responsibilities of the Consultant, County Management.
3. Written educational materials for citizens on county programs and budget that will be used in the project.
4. A written final Citizens Priorities for Thurston County Government document that includes the results of citizen outreach, analysis of the results and recommendations for incorporating the findings into the county Strategic Plan.
5. A communication plan and product for internal and external dissemination of the Citizen Priorities.

### For the County Strategic Plan:

6. A schedule for regular meetings with the Consultant and the County's management team to ensure consistency in planning and coordination of all components of the analysis, including a kick-off meeting and a final presentation.
7. A detailed project action plan, including a timeline of all stages in the scope of services, and a proposed breakdown of roles and responsibilities of the Consultant, County Management.
8. A written final Strategic Plan document that includes the vision, mission, goals, an implementation plan with milestones and performance indicators that measure the County's progress.
9. A communication plan and product for internal and external dissemination of the Strategic Plan and all its components.

### Section 3. Timelines

#### Project Timeline:

The objective of the county is to use citizen priorities and the strategic plan in the development of the 2019-2020 biennium budget. Development of the budget will begin in February 2018. All proposals should include a schedule that allows for the final deliverables prior to February 2018.

#### Contract Award Timeline:

Release Request for Proposals .....	June 15, 2017
<b>Vendor proposal responses due.....</b>	<b>July 17, 2017</b>
Vendor reference checks complete .....	July 28, 2017
Contract awarded .....	August 8, 2017

### Section 4. Vendor Instructions

The county must receive responses to this RFP no later than 5:00pm PST on Monday, July 17, 2017. Proposals received after that date will not be accepted. No additional time will be granted to any vendor unless by addendum to this RFP. Vendors may submit either in hard copy or electronically through e-mail. Vendors must submit a proposal with signatures and, if submitting a hard copy, one electronic version in Microsoft Word or .pdf format to the following address:

LaBonita Bowmar  
Clerk of the Board  
Office of the County Commissioners  
2000 Lakeridge Drive SW  
Olympia, WA 98502

[bowmarb@co.thurston.wa.us](mailto:bowmarb@co.thurston.wa.us)

#### Response Format

The RFP response should adhere to the following format:

Part 1 - Executive Summary: A cover letter that includes an overview description of proposed solutions, vendor experience and contact information (one page).

Part 2 – Scope and Deliverables: Proposed approach to the process, including a proposed schedule and description of proposed public involvement methods summarizing method and approach to providing consulting services to the County.

Part 3 – Examples: A minimum of three examples of relevant written work related to the scope of services and deliverables; at least one of which will represent a strategic plan prepared on behalf of a County or comparable entity.

Part 4 – Personnel: Name and title of the lead professional personnel to be assigned to the County project, and a list of the staff performing the work under this contract and their qualifications.

Part 5 - Pricing: Proposed budget including detailed project costs by task and estimated hours.

Part 6 - References: At least three references of current or previous clients with similar scope of work. The references must each include name of jurisdiction, name of contact, telephone number, email address and description of services performed for that client, and dates during which work was performed.

Part 7 – Other Information: General information and overview of the company, including the full name and address of the firm; the firm’s taxpayer identification number and Washington State UBI; assurance of the firm’s capacity to be available for this work as needed; other information that may provide value to the evaluation of your services.

Vendors that deviate from this format may be deemed unresponsive. Proposals should be prepared simply, providing a straightforward, concise delineation of the capabilities necessary to satisfy the requirements of the RFP. Elaborate promotional materials should not be submitted at this time. Emphasis in the proposals should be on completeness, clarity of content and adherence to the presentation structure required by this RFP and not on volume. Costs for developing proposals in response to the RFP are the obligation of the vendor and are not chargeable to the county. All proposals and accompanying documentation will become the property of Thurston County and will not be returned.

Pre-Submittal Questions: There will be no pre-bidders conference. Questions regarding the RFP may be submitted to Thurston County through Monday, July 10, 2017 via email at [bowmarb@co.thurston.wa.us](mailto:bowmarb@co.thurston.wa.us).

RFP Amendments: The county reserves the right to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in the evaluation of the proposal. The county reserves the right to change the RFP schedule or issue amendments to the RFP at any time. The county also reserves the right to cancel or reissue the RFP.

Rejection of Proposals: The county reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of Thurston County.

Proposal Validity Period: Submission of a proposal will signify the vendor’s agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between Thurston County and the successful vendor.

Disclaimer: The County reserves the right to share, with any consultant of its choosing, the RFP and any resultant proposals in order to secure expert opinion.

Non-Obligation: Receipt of proposals in response to this RFP does not obligate Thurston County in any way. The right to accept or reject any proposal shall be exercised solely by the county. The county shall retain the right to abandon the proposal process at any time prior to the actual execution of a contract with a vendor, and the county shall bear no financial or other responsibility in the event of such abandonment.

Public Disclosure: All materials provided to Thurston County by vendors are subject to State and Thurston County’s public disclosure laws.

## **Section 5. Evaluation of Proposals**

Proposals will be evaluated by a County team that includes, at a minimum, the County Manager, the Assistant County Manager, a representative of the County Elected Officials and a representative of the County Appointed Officials. This team will evaluate the proposals based on the criteria below. The county reserves the right to request interviews of vendors prior to final selection. Upon selection, a contract and fee will be negotiated based on the scope of work in this statement of qualifications and the fee structure submitted.

### Evaluation Factors

Selection of finalists will be primarily evaluated according to the following criteria:

1. Demonstrate effective and creative process to conduct the citizen priority surveys and facilitate the development of the updated strategic plan.
2. Experience and qualifications of the firm and staff in providing similar services.
3. Quality and completeness of Proposal including methods used to produce deliverables and adequacy in responding to the scope of services as defined in RFP.
4. Experience in effective public involvement and incorporating citizen input.
5. Demonstrated facilitation skills in successfully working with government elected officials, senior management teams, boards and commissions, community organizations, businesses and citizens.
6. Demonstrated knowledge and experience with actual development of citizen priority surveys, strategic plans, implementation of strategies and development of performance indicators.
7. Acceptable references including contact person, telephone number, and email address for each project used as a reference.
8. Cost.

The evaluation factors identified above reflect a wide range of considerations. While cost is important, other factors are also significant. The County may select other than the lowest cost solution. The objective is to choose a vendor capable of providing reliable services within a reasonable budget. All proposals will be evaluated using the same criteria. The County reserves the right to seek additional information and/or clarification from any proposer, to accept or reject any proposal to best serve its interest, or to hold the proposals for 60 days before rendering a decision.

### Contract Award and Execution

The county reserves the right to make an award without further discussion of the proposal submitted. The county shall not be bound or in any way obligated until both parties have executed a vendor contract. The county also reserves the right to delay contract award and/or not to make a contract award.

## **Section 6. Terms and Conditions**

The following terms and conditions apply to this RFP and are not inclusive of all terms and conditions in the final contract.

**Business License and Taxation:** The successful vendor and all subcontractors must hold valid business and professional licenses and registrations that may be required by the State of Washington.

**Nondiscrimination:** Thurston County hereby notifies all proposers that it will affirmatively ensure that all will be afforded full opportunity to submit qualification proposals in response to this Request for Proposal and will not be discriminated against because of race, color, creed, ethnicity, religion, national origin, age, sex, marital status, veteran or military status, sexual orientation or the presence of any disability. Implementation of this policy shall be consistent with RCW 49.60.400.

**Insurance Requirements:** The vendor awarded the contract will be subject to the county's requirements for insurance reflecting the minimum amounts and conditions as defined by the county.

**Workers' Compensation:** The vendor shall procure and maintain for the life of the contract Workers' Compensation Insurance covering all employees with limits meeting all applicable state and federal laws. This coverage shall include Employer's Liability with limits meeting all applicable state and federal laws. This coverage shall extend to any subcontractor that does not have their own Workers' Compensation and Employer's Liability Insurance.

**Proposals – Public Information:** The County will attempt to protect legitimate trade secrets of the Vendor. Any proprietary information contained in the Vendor's proposal must be clearly designated and shall be labeled with the words "Proprietary Information". Marking the entire proposal or any one or more of the major sections as proprietary will neither be accepted nor honored. The vendor should be aware that the county is required by law to make certain records available for public inspection with certain exceptions. The vendor, by submission of materials marked proprietary, acknowledges and agrees that the county will have no obligation or liability to the vendor in the event that the county must disclose these materials.

**Copyright and Confidentiality:** Selected vendor shall maintain strict privacy of all county records, data and files (regardless of media), including any copyrighted material received from the county.

**Prime Vendor:** It is recognized that multiple vendors may wish to combine their resources in responding to this Request for Proposal. A Proposal with such a combination is acceptable, provided that the complete Proposal contains all required information, and indicates which vendor shall be responsible for each of the components that make up the complete system. In addition, one of the vendors shall be designated as responsible for the complete definition, delivery, integration, implementation, and maintenance of the system, referred to as the prime vendor.

**Litigation/Jurisdiction/Venue:** Should either party bring any legal or equitable action, the prevailing party in such action shall recover, in addition to all other relief, its reasonable attorney's fees and court costs to be fixed by the court. Any and all such court action shall take place and be vested solely in the Superior Court of Washington.



Payment: The County will pay invoices submitted by the selected vendor as progress is made on the implementation project and agreed upon service stipulated in the final agreement. Prior to payment, invoices will be reviewed to determine if billing is reflective of actual agreed upon project progression and performance. Upon acceptance of the billing by the county's Assistant County Manager the payment will be processed and submitted to the vendor. Payment terms must adhere to the State of Washington codes and regulations.

Satisfaction of the Thurston County Prosecuting Attorney's Office. The acceptance and subsequent award of a submitted proposal shall be at the review and satisfaction of the county's attorney and the county's Assistant County Manager.

Subject to State Laws: The contract shall be subject to and interpreted pursuant to the laws of the State of Washington.

Release Authorization for Reference Check: Bidders must submit the following "Release Authorization for Reference Check" with your Proposal. The statement must be signed by an authorized representative of the proposer.

### **RELEASE AUTHORIZATION FOR REFERENCE CHECK**

By signing below, the Firm responding to this Request for Proposal authorizes past or present clients to provide information requested by Thurston County regarding work that is within the scope of this Request for Proposal. The Firm authorizes Thurston County to photocopy this signed release to be used in lieu of the original.

Firm Name:

Signature of Authorized Representative:

Typed name and title: