



Economic Vitality Corporation
of San Luis Obispo County
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REQUEST FOR PROPOSALS (RFP)

Ten Year Economic Development Strategy & Implementation Plan for San Luis Obispo County Communities and Sub-Regions

Response Deadline: April 24, 2020 5:00pm

EVC Contact: Loreli Cappel lcappel@sloevc.org 805.788.2015

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I. OVERVIEW

The Economic Vitality Corporation (EVC) is a non-profit economic development organization and a public-private partnership between business and local government. The EVC is seeking proposals from qualified consulting firms (“Consultant”) to provide a Ten Year Economic Strategy & Implementation Plan for our County and its sub regions. The Plan should build upon past and current plans and studies, and develop economic development strategies for the County as a whole and its four geographic sub regions (1. North County, 2. North Coast, 3. San Luis Obispo Central and 4. South County) and individual communities as appropriate. The geographic area shall include the incorporated and unincorporated communities of San Luis Obispo County, which are as follows:

Incorporated Cities (Sub region#)

1. Arroyo Grande (4)
2. Atascadero (1)
3. Grover Beach (4)
4. Morro Bay (2)
5. Paso Robles (1)
6. Pismo Beach (4)
7. San Luis Obispo (3)

Unincorporated Areas (Sub region #)

1. Avila Beach (4)
2. Cambria (2)
3. Los Osos (2)
4. Nipomo (4)
5. Oceano (4)
6. San Miguel (1)
7. Santa Margarita (1)
8. Templeton (1)

This project will be funded by a grant from the Economic Development Administration (EDA), which was awarded to the EVC in 2019 to prepare a strategy to increase economic vitality and resilience for the San Luis Obispo County economy. Consultant proposals for this effort should not exceed \$65,000.

Due to the COVID19 pandemic, this RFP process and project process may be done remotely using online technology tools for communication. Community engagement will also be limited due to a number of recently conducted projects and studies, whose outcomes will be made available to the Consultant Team.

Firms interested in responding must submit a PDF copy of their proposals to info@sloevc.org **by 5:00 PM on April 24, 2020.** Files over 10Mb may be sent via Dropbox. Proposals should not exceed 20 pages and should include all items as described in VII. Contents of Proposal.

Questions can be directed to:

Loreli Cappel, Senior Project Manager
Economic Vitality Corporation www.sloevc.org
805.788.2015
lcappel@sloevc.org

II. SCHEDULE

The tentative schedule and sequence of this RFP is as follows:

- | | |
|---|---------------------|
| 1. Issue Request for Proposals | March 26, 2020 |
| 2. Deadline for submitting questions | April 8, 2020 |
| 3. Response to questions | April 10, 2020 |
| 4. Proposal deadline (5:00pm PST) | April 24, 2020 |
| 5. Possible interviews (if needed) | Week of May 4, 2020 |
| 6. Begin contract negotiations with selected firms(s) | May 18, 2020 |
| 7. Contract executed | June 1, 2020 |
| 8. Project completion (on or before) | August 31, 2020 |

III. POLICY AND PROCEDURES

- a) All responding firms are encouraged to carefully review this RFP in its entirety prior to the preparation of the response. All documents from consultants must be submitted in accordance with the standards and specifications contained within this RFP.
- b) A response may be considered non-responsive if it is conditional or incomplete.
- c) All responses to the RFP become the property of the EVC.
- d) The EVC may, at its option, invite one or more of the responding firms to make a presentation to a selection committee before a final selection is made.
- e) The EVC may waive minor deviations from the RFP to encourage creative responses.
- f) EVC retains the right to withdraw this RFP or choose not to award a contract.

IV. ABOUT THE EVC

The contracting entity for this work is the Economic Vitality Corporation (EVC), a non-profit economic development organization serving all of San Luis Obispo County and is a public/private partnership supported by businesses and local government. As a leading voice of the business community, the EVC actively involves leadership from both private industry and local government throughout SLO County. The EVC's mission is to stimulate the vitality of the County's economy, help generate jobs, increase investment in the community, and promote the growth of local businesses. www.sloevc.org

V. ABOUT THE REGION

San Luis Obispo County is home to approximately 275,000 residents and is a special place to live, work, and play. The region's high quality-of-life, open space, foster a thriving business community. While the county has these valuable attributes and assets, it also has challenges such as a high cost of living making it one of the least affordable areas in the nation when comparing median incomes to median home costs. As well, the County experiences limited critical resources and infrastructure, such as water, transportation, and workforce housing. The region is well known for its beautiful outdoors, tourism, agriculture, its university, and diverse companies. For more information on our County's economy visit the EVC's Economic Dashboard at <http://www.sloevc.org/dashboard>.

Challenges Ahead: For the last 30 years, one of the largest private sector employer in the County has been Pacific Gas and Electric Company (PG&E), which operates the last nuclear power plant on the West Coast – the Diablo Canyon Power Plant (DCPP). In June of 2016, PG&E announced the permanent closure of the Diablo Canyon Power Plant (DCPP) and its two nuclear reactors in 2024 and 2025, followed by a plant decommissioning process that is anticipated to take a decade or more. The anticipated impacts from the power plant closure, recent floods and fires in our region, COVID19 and other factors, will have a monumental impact on our region. The purpose of this project will be to determine clear strategies for our best path forward toward economic recovery and resilience.

VI. SCOPE OF WORK / DELIVERABLES

The EVC is seeking a Consultant that can assess the region's existing economic data and prepare an economic strategy that includes a robust implementation plan. The following objectives include a summary of the minimum desired outcomes. Successful applicants should elaborate and provide a scope of services/tasks that reflect their approach to this project.

OBJECTIVE 1 – Research Existing Economic Data and Reports

The Consultant shall collect and assess economic data from the best available sources and other studies as available which may include public (Cities, County, School Districts) and private (PG&E) strategies, economic reports, and models, including those that quantify the economic impacts of recent natural disasters per FEMA Declarations 4301, 4305, and 4308-DR-CA, and regional forecast modeling tools (e.g., San Luis Obispo Council of Governments). The consultant should utilize this information to prepare an assessment of the current regional economic status and identify the economic conditions. This assessment will provide the foundation for the Economic Strategy in Objective 2.

At a minimum, the Consultant will be asked to review the following documents:

- SB-968 – Berkeley Study on Diablo Canyon Closure Impacts
- SB-1090 Diablo Canyon Closure Mitigation Funds
- REACH 2020 Jobs Plan
- Central Coast Economic Forecast Annual Report
- Visit SLO CAL – Destination Management Strategy
- City of San Luis Obispo Economic Development Strategic Plan
- City of Grover Beach Economic Development Strategy 2017
- City of Atascadero Economic Development Strategy 2009
- City of Arroyo Grande Economic Development Element 2012
- Morro Bay Economic Development Roadmap 2017
- Paso Robles Chamber of Commerce 2019 Economic Profile
- San Luis Obispo County 2019 RTP and 2014 RTP/SCS

OBJECTIVE 2 – Prepare a Ten Year Economic Development Strategy & Implementation Plan for San Luis Obispo County Communities and Sub-Regions

The purpose of the Ten Year Economic Development Strategy and Implementation Plan ("Plan") is to help unify the region under a coordinated economic strategy. This proposed strategy will be collaborative in nature and will incorporate and build off other efforts and programs by partner organizations and stakeholders.

The completed Plan should provide a ten-year roadmap for economic growth throughout the County, focusing closely on opportunities for partnerships and collaborations. The Plan shall include detailed actions that can be implemented by the EVC, and our public and private sector partners throughout our San Luis Obispo County communities. Additionally, the Plan

should describe how to leverage state and federal resources to advance economic development goals set forth in the Plan.

The Plan should contain specific economic development goals, strategies, and implementation actions for the County as a whole, for the four sub regions and for individual communities as appropriate. The Plan should include timeframes, anticipated costs, and funding sources for all implementation action items.

At a minimum, the Plan shall consist of:

1. A summary of the economic data assessment described in Objective 1.
2. A description of regional strengths and competitive advantages for the County, its four sub-regions and individual communities as appropriate.
3. Provision of regional, multi-jurisdictional, and community-specific goals, strategies, and implementation actions to:
 - a. increase economic diversification
 - b. diversify business type and demographics
 - c. target industry growth and job growth
4. Provide best practices and clear steps to start, grow, retain, and attract businesses by each of the four sub-regions.
5. An implementation action plan that includes estimated cost/resources needed, funding source(s), responsible agency(s), and timeframe (short, mid, or long-term).
6. The Plan shall be submitted in PDF and Microsoft Word format.

The above list of requirements have been derived from numerous community conversations. Due to a high number of ongoing regional efforts and studies, local stakeholders and community leaders have engaged in a number of discussions regarding economic development. These efforts have led to outreach and meeting fatigue. Therefore the Consultant's outreach strategy should be targeted to fill in the gaps from previous studies and engagement efforts. It is assumed that any necessary outreach can and will be conducted remotely given the recent COVID19 travel limitations. Attachment A includes a summary of objectives and needs described by each sub-region during previous engagement meetings.

The Consultant may describe any salient issues or areas the communities may have missed in developing the objectives/needs (identified in Attachment A) that should be considered as part of the Ten Year Economic Development Strategy & Implementation Plan. Include any tasks that add innovation to the project or are appropriate for successful project completion.

VII. CONTENTS OF PROPOSAL

Proposals shall not exceed twenty pages. Consideration of proposals by the EVC is contingent upon the submission of the mandatory information identified in this section. Failure to include any information item or to complete any form listed in reference in this RFP could result in the rejection of the proposal without further consideration. For ease of review and to

facilitate evaluation, proposals submitted in response to this RFP should be organized in order as follows:

1. Cover Page - Indicate the name of the firm or association and the RFP title.
2. Cover Letter
 - This letter shall provide a brief introduction, should summarize key elements of the proposal, and should include the name and address of the proposing firm and name, title, address, telephone number, email address, and fax number of the person(s) authorized to represent the firm. The name of the person who will serve as the Consultant's Project Manager must also be included. The letter must be signed by an officer of the firm who is authorized to bind the firm to all commitments made in the proposal.
3. Organization of Firm
 - Provide firm information including type of organization, location of principal office(s), years in business, number of employees, professional registrations and affiliations, and other pertinent information. Provide information regarding the structure and organization of the firm, including the name of the sole proprietor, or if a corporation, partnership, or joint venture, the names of all individuals and firms which constitute the corporation, partnership, or joint venture.
 - If two or more firms are involved in association or as a joint venture for this RFP, please provide information concerning past associations and outline the working relationship for this RFP between the firms, for example indicate where management responsibility resides and where quality control and production coordination will be performed.
4. Related Work Experience and Qualifications
 - Include a statement of qualifications that highlights relevant experience.
5. Response to Scope of Services
 - Describe the methodology, approach, techniques, schedules, and other necessary information to enable the EVC to clearly understand how the firm intends to perform the required services.
 - Provide a detailed staffing plan and task outline of how the firm will accomplish the Scope of Work.
 - Indicate deliverables or results for each major task.
 - Provide a project timeline.

6. Key Personnel

- Include the name(s) of all personnel who will be specifically assigned to this project. Identify the roles of each person assigned and provide a summary of their relevant experience in these roles and resumes.

7. References

- Provide a minimum of three (3) references for the proposing firm and each subcontractor (if applicable). Reference projects should have been completed within the last five (5) years and be similar in nature to those described in the scope of work. Include the telephone number, email, and name of a key contact person for each reference.

8. Fee Proposal

- Provide a detailed breakdown by task and personnel. Show key project staff and their contribution of hours to each task. Provide a fee schedule of hourly rates and other charges. Compensation will be based on a time and material basis with a not to exceed amount. The current budget for this project is \$65,000.

9. Minimum Insurance Requirements

- A statement from the proposing firm stating it can meet the minimum insurance requirements outlined in this RFP.

10. Conflict of Interest

- In order to comply with federal grant requirements, describe any existing or potential conflicts of interest that may arrive from this engagement.

VIII. EVALUATION PROCEDURES AND CRITERIA

An evaluation committee will review submissions based on the following evaluation criteria and scoring.

	Description	Max Points
1	Qualifications based on overall professional and practical experience of firm including the ability to perform and complete projects on time and within budget	20
2	Specific experience of firm and key personnel in completion of similar projects	30
3	Project implementation/approach, including the ability to perform and complete the project on time	35
4	Project innovation	5
5	Proposed budget	10

IX. SELECTION, NEGOTIATION OF FEE, AND ENGAGEMENT PROCESS

The EVC will review all proposals initially to verify that the proposing firms and proposals meet the mandatory requirements set forth in this RFP and that the proposals are responsive to the RFP. After determining that a proposing firm meets the mandatory requirements and that its proposal is responsive, the firm will receive a preliminary score/ranking. Based on the initial ranking, the EVC may select and conduct interviews with one or more qualified firms. The interview rankings, if conducted, will contribute to the selection of the most qualified firm(s).

The EVC will attempt to negotiate a mutually agreeable professional services agreement with the most qualified firm(s). Fee and hourly rate information submitted with the RFP will be used for discussion purposes and will not be disclosed to other proposing firms.

In the event the EVC is unable to negotiate a satisfactory contract with the firm considered most qualified, negotiations with that firm will be formally terminated. The EVC will then undertake negotiations with the next qualified firm. Should the EVC be unable to negotiate a satisfactory contract with either of the top two qualified firms, then the EVC may select additional firms in order of their competence and qualifications and continue negotiations, or take whatever other actions are deemed to be in the best interest of the EVC. After award of the contract(s), the EVC will tender the contract to the selected firm. Upon receipt of the signed contract and all required Exhibits, the EVC will execute the contract.

All project deliverables must be submitted to the EVC no later than August 31, 2020.

The EVC reserves the right to select the firm, which in the EVC's sole judgment, best meets the needs of the project objectives.

X. INSURANCE REQUIREMENTS

- a) Worker's Compensation Insurance must be maintained by the Consultant for the duration of the contract in an amount required by the State of California. Said policy must also include employer's liability coverage no less than one million dollars (\$1,000,000.00) per accident for bodily injury and disease.
- b) General Liability Insurance must be maintained by Consultant for the duration of the contract in the amount of one million dollars (\$1,000,000.00) per occurrence and two million dollars (\$2,000,000.00) aggregate for bodily injury, personal injury, and property damage. Said insurance must name the EVC, its board, employees, agents, and volunteers as additional insured.
- c) Automotive Liability Insurance must be maintained by the Consultant for the duration of the contract in an amount not less than one million dollars (\$1,000,000.00) per

occurrence for bodily injury and property damage. Said insurance must name the EVC, its board, employees, agents, and volunteers as additional insured.

- d) Professional Liability Insurance must be maintained by Consultant for the duration of the contract for any loss arising out of errors, omissions, or negligent actions of the Consultant and in an amount not less than one million dollars (\$1,000,000.00) per occurrence and two million dollars (\$2,000,000.00) aggregate.

Evidence of coverage and Certificates of Insurance naming the EVC, its board, employees, agents, and volunteers as additional insured must be delivered to the EVC prior to the execution of the contract(s).

XI. CIVIL RIGHTS

- a) Consultant agrees to comply with Title VII of the Civil Rights Act of 1964, as amended, the California Fair Employment Practices Act, the Americans with Disabilities Act of 1990, any other applicable federal and state laws and regulations hereinafter enacted.
- b) Consultant shall not knowingly deny an opportunity or benefit, discriminate against or harass, any employee or applicant for employment on account of the person's race, color, ethnicity, national origin, ancestry, religion, creed, veteran status, physical disability, mental disability, medical condition, marital status, sex, sexual orientation, age, or other status protected from workplace discrimination by state or federal law.
- c) Consultant shall not knowingly give preferential treatment to any applicant for employment on the basis of race, color, ethnicity, national origin, ancestry, religion, creed, physical disability, mental disability, medical condition, marital status, sex, or sexual orientation.
- d) This section shall be interpreted in a manner that is consistent with the California and United States Constitutions and applicable state and federal statutes governing workplace discrimination. The terms used in this section shall have the same meaning as defined in state statutes governing the same subject matter.
- e) Nothing in this section shall be interpreted as prohibiting bona fide occupational qualifications consistent with applicable state and federal law and reasonably necessary to the normal operation of Consultant. Nothing in this section shall be interpreted as prohibiting regulations and policies to prevent nepotism or conflicts of interest.
- f) Nothing in this Section shall be interpreted as prohibiting action taken to establish or maintain eligibility for any federal program, where ineligibility would result in a loss of federal funds to EVC.
- g) To the fullest extent permitted by law and without limitation by the other provisions of this RFP relating to indemnification and insurance, Consultant shall also indemnify, defend and hold harmless EVC, and its directors, officers, employees and agents from and against all liability (including without limitation all claims, damages, penalties, fines, and judgments, associated investigation and administrative

expenses, and defense costs, including but not limited to reasonable attorneys' fees, court costs, and costs of alternative dispute resolution) resulting from any claim of discrimination or harassment, including but not limited to sexual harassment, arising from the conduct of the Consultant or any of the Consultant's officers, employees, agents, licensees, or subcontractors. In the event of a discrimination or harassment complaint against any employee, agent, licensee or subcontractors of Consultant or its subcontractors, Consultant shall take immediate and appropriate action in response to such complaint, including, but not limited to termination or appropriate discipline of any responsible employee, agent, licensee or subcontractors.

XII. FINANCIAL RECORDS

Consultant shall maintain any and all documents, ledgers, books of account, invoices, vouchers, canceled checks, or records demonstrating or relating to Consultant's performance of services pursuant to the scope of services identified in this RFP. Any and all such documents or records shall be maintained in accordance with generally accepted accounting principles and shall be sufficiently complete and detailed so as to permit an accurate evaluation of the services provided by Consultant

XIII. SEVERABILITY

If any terms or provisions of this Request for Proposal shall be found to be illegal or unenforceable, then such term or provision shall be deemed stricken and the remaining portions of this document shall remain in full force and effect.

XIV. ATTACHMENT

- a. Countywide and Sub-region Objectives and Needs

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ATTACHMENT A

COUNTYWIDE OBJECTIVES FOR ALL COMMUNITIES/SUBREGIONS:

- Develop actions or projects to address needs to grow the County economy by unique sub-region
- Provide best practices and clear steps to start, grow, retain and attract businesses by sub-region
- Foster and diversity in business type and demographics

SUB-REGION SPECIFIC NEEDS (IN ADDITION TO ABOVE):

In addition to the countywide objectives above, the below input has been provided from local jurisdictions on specific areas of focus or desire for this economic development project.

NORTH COUNTY SUB-REGION:

Paso Robles

- Develop actions or identify projects to address needs to grow Paso Robles and the North County economy
- Prepare best practices and draft clear steps to start, grow, retain, and attract businesses
- Discuss way to increase office space for above businesses
- Gain the attention of young professionals in a way that illustrates that North County is a desirable place to live and own a business
- Focus on the trades/talent pipeline
- Define a BIG North County project/catalyst to foster economic development
- Coordinate with the tourism and hospitality industry (e.g. bring corporate trade shows, conference, etc. to the Paso Robles Event Center and hopefully to a future conference center)

Atascadero

- Develop recommendations for long and short-term actions to improve the Atascadero/North County Economy overall
- List of priorities for highest and best use for city funding allocation
- Define the assets in Atascadero/North County and identify ways to capitalize on them to grow the local and regional economy
- Develop suggestions to help market the city for business (e.g. website)
- Best practices and clear steps to start, grow, retain, and attract businesses

NORTH COAST SUB-REGION:

Morro Bay

- See Countywide Objectives

- See Economic Development Strategy

SLO SUB-REGION:

San Luis Obispo

- See Countywide Objectives
- See City of San Luis Obispo Economic Strategic Plan priorities and make suggestions

SOUTH COUNTY SUB-REGION:

Arroyo Grande

- See Countywide Objectives

Grover Beach

- Commission an economic outlook for Grover/South County, and strategies for:
 - Closure of Diablo Canyon
 - Future impact of cannabis industry
 - Develop alternatives to future potential closure of Oceano Dunes
- Working with South County Chamber on co-working space and marketing city
- Help the City grow and attract businesses from outside the county through marketing
- Periodically convene city managers and industry (e.g. cluster leaders) about:
 - EVC updates, City updates, Industry updates

Pismo Beach

- Commission economic outlook of, and strategies for:
 - Closure of Diablo Canyon
 - Impact of cannabis industry
 - Develop alternatives to future potential closure of Oceano Dunes
 - Implementation of/Advocacy for Central Coast Blue Project (reclaimed water project)

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END OF DOCUMENT