

Request for Proposals
Town of Florence Strategic Plan



Town of Florence
P.O. Box 2670
775 North Main Street
Florence, Arizona 85132
Issued: November 19, 2015

Table of Contents

1.0	Invitation/Public Notice	1
2.0	Introduction/Background	3
2.1	Town Data	3
3.0	Terms of Reference	4
3.1	Scope of Work	4
3.2	Consultant	5
3.3	Deliverables	5
3.4	Consultation	6
3.5	Background Documents	6
4.0	Evaluation	7
4.1	Review Committee	7
4.2	Evaluation Criteria	7
4.3	Town's Rights	7
5.0	Protests	9
6.0	Instructions	9
6.1	Closing Date/Time/Location	9
6.2	Inquiries	9
6.3	Proposal Document Format	9
6.4	Cover Letter and Signature	10
6.5	Amendments to Proposals	10
6.6	Addenda	11
6.7	Withdrawal of Proposals	11
6.8	Important Dates	11
6.9	Budget	11

7.0	Additional Terms	11
7.1	Standard Agreement Provisions	11
7.2	Indemnification	11
7.3	Insurance Requirements	12
7.4	Legal Worker Requirements	12

1.0 Invitation/Public Notice

The Town of Florence is requesting proposals from qualified consulting firms to assist in the development of a Strategic Plan. The successful candidate must have extensive strategic planning experience, including the ability to conduct all required research, coordinate and facilitate the planning process and create a strategic planning document suitable for public review and presentation.

TOWN OF FLORENCE PUBLIC NOTICE REQUEST FOR PROPOSALS (RFP)

The Town of Florence is requesting proposals from qualified consulting firms to assist in the development of a Strategic Plan. The successful candidate must have extensive strategic planning experience, including the ability to conduct all required research, coordinate and facilitate the planning process and create a strategic planning document suitable for public review and presentation.

Questions regarding this request for proposals must be directed in writing to Mark Eckhoff, Community Development Director, at mark.eckhoff@florenceaz.gov. You can view the Town's website at www.florenceaz.gov to obtain a copy of the RFP or to obtain additional information on the Town and this Project.

Proposals should be labeled "**Town of Florence Strategic Plan**" and are due by December 18, 2015 by 3:00 p.m. local time (MST) in the Town Clerk's Office, 775 North Main Street (P.O. Box 2670) Florence, Arizona 85132.

Display AD – Florence Blade and Reminder W/AFF of Publish

Date: November 26, 2015

2.0 Introduction/Background

Florence, founded in 1866, is a full-service, Council-Manager form of government with a Mayor, Council and Town Manager that oversee the operations of the following departments: Administration, Courts, Finance, Fire, Library, Parks and Recreation, Community Development, Police and Public Works.

The Town has changed dramatically over the past decade, largely because of the inception of the Anthem at Merrill Ranch master planned community that is located north of the historic center of Florence. One of the oldest settlements in Arizona, the Town has a rich history and a desire to respect its heritage while concurrently encouraging new growth.

The Town is preparing for major growth and development over the coming decades as Florence is at the center of the growing Sun Corridor in between the Phoenix and Tucson metropolitan areas. With this growth, the Town appreciates the need to proactively and comprehensively prepare for the community's future. A Strategic Plan, as well as the in-depth planning process of developing such, will help to guide the community over the coming years. Working in concert with other plans and documents, the Strategic Plan will serve as the community's guidebook for future policy decisions and actions so that Florence may maintain its position as the heart of Pinal County and have boundless opportunities for success.

2.1 Town Data

- Incorporated Area: 62 square miles
- Municipal Planning Area: 196 square miles
- Elevation: 1,493 feet above sea level
- Population: 25,536 (2010 Census)

Infrastructure:

- Water: Town of Florence and Johnson Utilities
- Sewer: Town of Florence and Johnson Utilities
- Streets: Town of Florence and AZ Department of Transportation
- Electric: APS, SRP and BIA (SCIP)
- Gas: Southwest Gas
- Sanitation: Town of Florence and Right Away Disposal

Largest employers:

- Various Private and Public Correctional Facilities
- Pinal County Government (Florence is the County seat)
- Florence Unified School District
- Town of Florence
- Safeway

3.0 Terms of Reference

3.1 Scope of Work

The purpose of the Town of Florence Strategic Plan RFP is to develop an organizational strategy that includes a long-term vision and values, together with medium-term objectives and priorities and shorter term action plans. The Town understands that there are a variety of perspectives, models and approaches that can be used to develop a strategic planning document. The selected consultant, therefore, should be able to discern which model or model(s) would be best suited to meet the needs of the Town, enabling the Town to complete its organizational and programmatic goals.

The Town of Florence will create a long term strategic plan/vision that will focus on economic, employment and community development directions. These directions are intended to help improve the quality of life for Town of Florence residents, as well as position our Town as both a destination Town and one focused on development in the commercial and industrial sectors. Our Town is a progressive community that has a number of plans and studies available that will help provide the framework for creating a strong Strategic Plan to take forward into the future.

The extent of community and employee consultation into the strategic planning process has not yet been determined. Council will make that decision once the strategic planning consultant has been selected, based on the information and recommendations as contained within the successful Proposal. Proponents are requested to provide detailed information on options for community and staff consultation as part of their Proposal.

The Plan should build upon or complement other studies and plans. Previous strategic and other plan materials will be provided to the consultant as background information.

The Strategic Plan should include methods (including strategy and specific actions, with first steps) to accomplish goals in each of the areas of the Town. The Plan should also include actions to enhance the success of the long-term strategies. This will enable the Town to experience and report quick successes. The Strategic Plan should include a summary of critical issues facing the Town of Florence in its effort to meet the goals set forth in the plan, as well as available resources that can be utilized.

Each Proponent, by submitting a Proposal, represents that the Proponent has read, completely understands, and accepts the terms and conditions of this RFP in full and agrees that should its Proposal be successful, the Proponent will enter into a service contract with the Town of Florence.

Final Report

The consultant will make any recommendations to the draft Strategic Plan after review and approval by the Town's Strategic Planning Team (SP Team) and prior to submittal to Council for adoption. The Consultant may be required to change the submitted draft after the SP Team and Town Council have reviewed. The Plan, inclusive of any required changes, will become the final and published Plan. This document and any supporting documents should be produced in both paper and digital formats.

3.2 Consultant

Preference will be given to a single consultant, (creating cost and communication efficiencies), that can complete all of the tasks. A brief organizational review will also be conducted in order to give recommendations as to how the Town of Florence staff can best implement the strategy in a team environment as well as deliverables for their own specific departments.

The minimum requirements for Proposals in response to this RFP are as described in this document. A Proponent may submit additional information that it feels is relevant to the provision of the services described herein.

3.3 Deliverables

The consultant will be responsible for providing expert advice throughout the project, and for the following deliverables at a minimum:

- Prepare a general communication/consultation strategy.
- Develop an action plan to achieve the mandate of the RFP.
- Provide project coordination, including regular meetings and status reports to keep the project on schedule and keep identified stakeholders apprised of the process.
- Orient and train the participants to the process and components of strategic planning.
- Reference plans and studies to provide a solid framework for the Strategic Plan.
- Collect community and employee input, including gathering of stakeholder information and input as well as using appropriate methods of communication and engagement.

- Complete needs assessment or an environmental scan by reviewing existing plans and documents pertinent to the comprehensive strategic plan, identifying trends and patterns that are applicable, analyze strengths, weaknesses, opportunities and threats.
- Facilitate the discussion and decision making process and ensure that conversations are forward-looking, action oriented and move the participants towards creating a shared future.
- Coordinating and take minutes of all meetings, including community and staff consultation sessions. This can be in conjunction with assigned Town staff.
- Organize and facilitate public meetings to disseminate and gather information relevant to the process.
- Develop an interim and final report for the project, including executive summary.

The Proponents are not limited by the deliverables as outlined above. Proposals may provide additional deliverables as part of the Proponent's response.

3.4 Consultation

As noted in the previous section, the extent of community and staff consultation required as part of the strategic planning process has not yet been determined. Proponents are requested to provide detailed information on options for community and staff consultation, including the approach to consultation, the associated cost and the time-frame involved. Proponents are further requested to recommend the most effective and efficient method of engaging stakeholders in the strategic planning process.

As part of the deliverables, the consultant will prepare a communication/consultation strategy that will form the basis of the consultation process for the project. This would be for both the internal and external aspects of the project. The communication strategy shall identify the best means of communicating with the general public and target groups.

Through the consultation process, the ideas, opinions, visions, values, and projects will be gathered, summarized and presented in a matrix format for review under broad headings, such as economic, social, environmental and infrastructure.

3.5 Background Documents

The following documents are available on the Town's website. These documents will assist the Team in the development of the Strategic Plan and may play a key role in shaping the direction within the Plan.

- Town of Florence Code of Ordinances
- Town of Florence 2020 General Plan
- Town of Florence Downtown Redevelopment Plan
- Town of Florence Town Limits Map

Town of Florence
Strategic Plan RFP

- Town of Florence Zoning Map
- North End Framework Vision Plan
- Town of Florence Parks, Trails and Open Space Master Plan

In addition, should the consultant require, the Town will provide required base mapping for details of the Town from its GIS system.

4.0 Evaluation

4.1 Review Committee

The Town Manager will determine the Town staff that will form the SP Team and review submissions. The Town Manager will prepare a recommendation report to Council with respect to the approval of the successful Proponent and award the contract to the successful candidate.

4.2 Evaluation Criteria

All Proposals will be evaluated using an evaluation matrix on the basis of experience, proposed work plan, timeframe for completion, and fee, according to the guidelines provided above.

The Town may choose to interview certain participants to clarify issues. Participants are advised that only complete submissions shall be reviewed and evaluated. However, the Town may deem it necessary in the interest of the Town to request additional information.

Submitted Proposals will be evaluated upon the following evaluation matrix:

1. Quality of Approach and Methodology - 30%
2. Work Plan, Schedule and Level of Effort - 20%
3. Experience of Consultant -15%
4. Experience and Qualifications of Key Team Members -15%
5. Understanding of Objectives -10%
6. Budget – 10%

4.3 Town's Rights

The Proponent is entirely responsible for all costs associated with the preparation of this proposal. The Town will not reimburse the selected Proponent for any work performed prior to the execution of a contract and a notice to proceed letter is received by the selected Proponent.

This RFP does not constitute an offer of any nature or kind whatsoever by the Town to the Proponents. The Town does not bind itself to accept any Proposals and may proceed as it determines, in its sole discretion, following receipt of the Proposals.

The Town reserves the right to accept any Proposal in whole or in part or to discuss with any Proponent, different or additional terms to those envisaged in this RFP or in such Proponent's Proposal.

The Town has the right to:

- Cancel the RFP at any time without liability whatsoever to any Proponent;
- Accept or reject any of the Proposals;
- Not accept the lowest fixed fee amount;
- Alter the schedule, RFP process, procedures or objective of the project or any other aspect of the RFP, as it may determine in its sole and absolute discretion; and
- Negotiate with one or more Proponents to reach a final agreement for the services.

The RFP or the Proposal does not constitute a binding agreement, but will only form the basis for the finalization of the terms upon which the Town and the chosen Proponent will enter into a final agreement (the "Agreement"), and does not mean that the Proposal is necessarily totally acceptable in the form submitted. After the selection of a Proposal, if any, the Town has the right to negotiate with the Proponent and, as part of that process, to negotiate changes, amendments or modifications to the Proposal without offering the other Proponents the right to amend their Proposals.

All materials submitted by Proponents shall become the property of the Town and become a matter of public record available for review pursuant to Arizona State law. Each Proponent shall mark any information submitted as part of its proposal that the Proponent deems confidential or proprietary (collectively Confidential Information). If the Town receives a request to review or disclose such Confidential Information, the Town will provide the Proponent written notice of the request to allow the Proponent the opportunity to obtain a court order to prevent the disclosure or review of such Confidential Information. The Proponent must obtain and deliver to the Procurement Officer a court order within seven calendar days of the date of the Town's written notice. If no court order is issued and received by the Procurement Officer within the 7-day period, the Town may disclose or allow the review of such Confidential Information. If a Proponent intends to seek a court order to shield its Confidential Information, the protest period will be extended seven calendar days to allow for this process.

5.0 Protests

Protests shall be submitted in writing to: Town Manager, Florence Town Hall, 775 North Main Street, P.O. Box 2670, Florence, Arizona 85132, phone (520) 868-7500 or (520) 868-7502 (TDD Relay) within 72 hours of notification award. Protests must contain at a minimum, the name, address, and telephone number of the protester; the signature of the protester or its representative and evidence of the authority to sign; a detailed statement of the legal and factual grounds of the protest including copies of relevant data; and the form of relief requested. Within three business days of receipt, and after consultation with legal counsel, the Town will respond to the protest.

6.0 Instructions

6.1 Closing Date / Time / Location

Consultants are to provide ten (10) hard copies of their Proposal, plus one electronic version on DVD or USB flash drive in a sealed package, clearly identified as to the contents and addressed to:

Town Clerk's Office, 775 North Main Street (P.O. Box 2670) Florence, Arizona 85132. Proposals are due by December 18, 2015 by 3:00 p.m. local time (MST). Proposals received after the due date and time will not be considered. Fax or electronic submissions will not be accepted.

6.2 Inquiries

Questions regarding this RFP must be directed in writing to Mark Eckhoff, Community Development Director at mark.eckhoff@florenceaz.gov. You may view the Town's website at www.florenceaz.gov to obtain a copy of the RFP or to obtain additional information on the Town and this Project.

All inquiries and responses will be distributed directly to all Proponents that provide written confirmation to the above identified individual, via email, that they wish to receive any further information about this RFP, and provide the following information in that confirmation: company name; contact person; email address; and phone number.

6.3 Proposal Document Format

As the SP Team will be studying several Proposals, the task of evaluating each one and comparing it against the others would be more easily accomplished if all Proposals follow the same general format. For this reason, the Proposal shall follow these guidelines:

Section 1: Introduction

In this section, the Proponent shall specifically note any exceptions or deviations from the Request for Proposal as well as confirm their full understanding of the intent of the Request for Proposal.

Section 2: Experience

Names and qualifications of individual project team members and how their experience directly relates to this project. References of similar work should also be included in this section.

Section 3: Work Plan

Include a work plan describing the main tasks to be undertaken, as per the “Scope of Work” section. Within the body of the work plan, the Proponent shall list the team members who shall be overseeing each of the respective parts of the investigation and the estimated hours for each team member.

Section 4: Project Cost

This section will include a detailed breakdown of anticipated costs (staff time and disbursements, etc.) as well as the total project cost. A complete detailed price breakdown shall be included in the Proposal identifying all applicable costs, including per diem rates for all personnel, travel costs, public meeting costs, etc.

Section 5: Appendices

A1. References (Include names, current contact telephone numbers and email addresses).

A2. Team members Resumes.

A3. Consultation options and recommended method.

6.4 Cover Letter and Signature

The Proposal shall include a cover letter signed by a person authorized to legally bind the Proponent to the statements made in their Proposal.

6.5 Amendments to Proposals

Proposals may be amended in writing and delivered to the closing location before the closing time, but not after. Such amendments should be signed by the authorized signatory of the Proponent and delivered to the Town Clerk.

6.6 Addenda

If the Town determines that an amendment is required to this RFP, the Town will post it to www.florenceaz.gov/rfp and send an electronic copy of the addendum to each of the Proponents that have submitted their information to Mark Eckhoff, as described in Section 6.2 of this RFP. Each addendum will be incorporated into and become part of the RFP.

6.7 Withdrawal of Proposals

The Proponent may withdraw their Proposal at any time prior to the closing time by submitting a written withdrawal letter to the Town Clerk. This letter must be received by the Town Clerk prior to the closing time.

6.8 Important Dates

Release of RFP: November 19, 2015

RFP notice in local paper: November 26, 2015

Questions regarding RFP: Before 4:30 p.m. local time (MST) – December 9, 2015

Deadline for submission: By December 18, 2015 by 3:00 p.m. local time (MST)

6.9 Budget

The total budget for this project has not been determined.

7.0 Additional Terms

7.1 Standard Agreement Provisions

The submission of a proposal in response to this RFP constitutes the acknowledgement of the Proponent that any agreement resulting from this RFP initially will be prepared by the Town of Florence. The submission of a proposal shall further constitute the agreement of the Proponent that they will not insist on the use of standard contract agreements, documents or forms, and that they waive any demand for the use of their standard agreements. Pursuant to Town Code, the language of the agreement to be executed will be drafted under the supervision of the Town Attorney and shall be the controlling document.

7.2 Indemnification

Proponents shall indemnify, defend, save and hold harmless the Town and its officers, officials, agents, and employees (hereinafter referred to as "Indemnitee") from and against any and all claims, actions, liabilities, damages, losses, or expenses (including court costs, attorneys' fees, and costs of claim processing, investigation and litigation) (hereinafter referred to as "Claims") for or loss or damage to tangible or intangible property caused, or alleged to be caused, in whole or in part, by the directors, agents,

employees or subcontractors. This indemnity includes any claim or amount arising out of our recovered under the Workers' Compensation Law or arising out of the failure of such contractor to conform to any federal, state or local law, statute, ordinance, rule, regulation or court decree. It is the specific intention of the parties that the Indemnitee shall, in all instances, except for Claims arising solely from the negligent or willful acts or omissions of the Indemnitee, be indemnified by Proponent from and against any and all claims. It is agreed that Proponent will be responsible for primary loss investigation, defense and judgement costs where this indemnification is applicable. Incorporated into any agreement that is entered into with the Town will be the requirement that the Proponent, at its sole cost and expense, shall and does hereby indemnify, defend and hold the Town harmless from and against any challenge, whether administrative, judicial or otherwise, by any person or entity, to the Town's execution or performance under said agreement, which indemnification shall survive the expiration or earlier termination of said agreement.

7.3 Insurance Requirements

Proponent shall procure and maintain until all of their obligations have been discharged, including any warranty periods under the future agreements are satisfied, insurance against claims for injury to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Proponent, its agents, representatives, employees or subcontractors. Insurance requirement will be outlined within the agreements that result from the selection of a successful proposal.

7.4 Legal Worker Requirements

The Town is prohibited by A.R.S. 41-4401 from awarding an agreement to any contractor who fails, or whose subcontractors fail, to comply with A.R.S. 23-214(A). Therefore, Proponent agrees by submitting this proposal that:

1. Proponent and each subcontractor it uses warrants their compliance with all federal immigration laws and regulations that relate to their employees and their compliance with 23-214, subsection A.
2. A breach of a warranty under paragraph 1 shall be deemed a material breach of the agreement and is subject to penalties up to and including termination of the agreement.
3. The Town retains the legal right to inspect the papers of the Proponent or subcontractor employee(s) who work(s) on this agreement to ensure that contractor or subcontractor is complying with the warranty under paragraph 1.