



REQUEST FOR PROPOSAL

25-28 RFP

COMMUNITY ENGAGEMENT AND OPINION RESEARCH FOR THE DEVELOPMENT OF A STRATEGIC PLAN

Shasta County

1450 Court St.

Redding, CA 96001

RELEASE DATE: May 14, 2025

DEADLINE FOR QUESTIONS: May 26, 2025

RESPONSE DEADLINE: June 11, 2025, 2:00 pm

Shasta County
REQUEST FOR PROPOSAL
COMMUNITY ENGAGEMENT AND OPINION RESEARCH FOR THE
DEVELOPMENT OF A STRATEGIC PLAN

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1. INTRODUCTION

1.1. Summary

The County of Shasta, through its Department of Support Services, Purchasing Unit, invites responses to a Request for Proposals to provide a Community Engagement Consultant for the development of a Strategic Plan for Shasta County.

1.2. Contact Information

Project Contact:

Leticia Swanson

Purchasing Manager

1450 Court St

Suite 348

Redding, CA 96001

Email: lswanson@shastacounty.gov

Phone: [\(530\) 229-8244](tel:(530)229-8244)

Procurement Contact:

Lynne Davis

Agency Staff Services Analyst II - Confidential

1450 Court St.

Room 348

Redding, CA 96001

Email: ldavis@shastacounty.gov

Phone: [\(530\) 225-5342](tel:(530)225-5342)

Department:

Purchasing Department

1.3. Timeline

Release Date	May 14, 2025
Question Submission Deadline	May 26, 2025, 2:00pm
Proposal Submission Deadline	June 4, 2025, 2:00pm Electronic Submittal Location: https://procurement.opengov.com/portal/shastaca

2. DEFINITIONS

For the purposes of this RFP process, the following definitions apply:

Consultant means the person(s) or entity(ies) who enter into a Contract to provide Community Engagement and Opinion Research for The Development of a Strategic Plan.

Contract means the written agreement between the County and any Responder selected. The County intends to use its Standard Personal Services Agreement (PSA), attached hereto and incorporated herein, as the template for the Contract which can be found in [ATTACHMENTS](#).

County Business Days means Monday through Friday except County holidays as designated by the Shasta County Board of Supervisors.

County Business Hours means 8:00 a.m. to 5:00 p.m., Pacific Time, during County Business Days.

Proposal means the written submission to the County in response to this RFP.

Request for Proposal (“RFP”) means this invitation to submit a Proposal.

Responder means any person or entity submitting a Proposal.

In the event any defined term is used in this RFP that is not defined in this document, the defined term shall have the meaning attributed to it in the Contract.

3. BACKGROUND AND PURPOSE

The County of Shasta is embarking on the development of a five-year Strategic Plan. This RFP aims to gather input from community stakeholders to ensure alignment with the shared vision of local residents. This initiative will help Shasta County refine its long-term strategies by identifying potential opportunities across the region and enabling partners to capture, share, and act on the outcomes of community engagement efforts. The goal is to empower Shasta County to shape future investments and maximize their impact, both financially and in terms of measurable accomplishments.

4. FUNDING

Funding for any resulting agreement will come from the General Fund.

5. SCOPE OF WORK

5.1. Overview

The Consultant will design and implement an inclusive engagement strategy that actively involves a diverse range of stakeholders across Shasta County, ensuring that all voices are heard and represented in the planning process with the goal of identifying the community’s key priorities, goals, and vision for the next five years. The strategy should leverage innovative techniques, such as interactive workshops, virtual platforms, and other creative methods, to gather meaningful input and foster collaboration among community members.

Collaboration with department heads will be essential to define their vision for the Strategic Plan. The Consultant will conduct interviews, surveys, and focus groups with internal stakeholders, including County staff, to ensure that their perspectives are integrated into the planning process.

In addition, the Consultant will work to identify and implement a variety of participatory methods to engage both internal and external stakeholders, including community partners, local organizations, and residents. The goal is to ensure that the engagement process is inclusive, equitable, and effectively empowers the community to contribute to shaping the future of Shasta County.

The Consultant will provide regular updates and feedback to the Strategic Plan Ad-Hoc Committee as well as other key stakeholders throughout the process, ensuring transparency and alignment with the County's objectives. All feedback will be documented ensuring it reflects the collective input gathered from the diverse stakeholders involved.

Responders must demonstrate their ability to meet all of criteria as set forth herein.

5.2. Minimum Qualifications:

- A. Experience in Community Engagement for Strategic Planning: Responders must have proven experience specifically related to community engagement efforts aimed at developing a Strategic Plan.
- B. Familiarity with Rural County Government in California: Responders should have knowledge of county or municipal government in California, preferably including an understanding of the unique challenges and opportunities faced by rural communities.
- C. Facilitation of Inclusive Processes: Responders must demonstrate the ability to facilitate inclusive and participatory processes with diverse groups, ensuring proportional representation across demographic and geographic populations.

5.3. Project Scope:

- A. Opinion Research: Conduct opinion research within California, covering both rural and urban areas, to capture a broad spectrum of community perspectives.
- B. Community Assessment: Identify and engage key stakeholders, understanding their key priorities, goals, and vision for the next five years in relation to the Strategic Plan.
- C. Engagement Strategies: Develop a comprehensive engagement plan using various methods (e.g., workshops, surveys, online forums) to ensure effective community participation.
- D. Facilitation: Guide community discussions and workshops to gather direction for the development of the strategic plan.
- E. Communication: Provide regular updates and progress reports throughout the engagement process to keep all stakeholders informed.

- F. Data Analysis: Develop and report on relevant categories of data, using multiple demographic cross-sections.
- G. Data Provision: Analyze the collected data, breaking it down into relevant categories, and report the findings in an accessible and actionable format.
- H. Delivery: Present analysis in both verbal and written formats to ensure clarity in order to facilitate decision-making.

5.4. Deliverables:

- A. Findings and Recommendations Narrative: A comprehensive narrative to summarize findings, lessons learned, and recommendations, along with clear justifications for those recommendations.
- B. Presentation: Report on what the community and County Department Heads and other staff believe the key priorities, goals and vision for the next five years. A presentation to the Shasta County Board of Supervisors and their constituents will be required within 3-4 months of the project start date.
- C. Data Collection Plan: A detailed plan for data collection, including research questions, strategies, timelines, and volume estimations of the data required for thorough analysis.
- D. Data Accessibility: Collected data provided in a user-friendly format, enabling easy access, analysis, and distribution. Data should include, at a minimum, raw data from any surveys, minutes from all group and individual meetings, and a list of all individuals with which relevant conversations were held.
- E. Analysis of Data: A detailed analysis of the collected data, delivered in both written and verbal formats, broken down into relevant categories for clarity and action. Analysis should be completed within three months from contract execution.

6. CONTRACT INFORMATION

If the County chooses to fund and proceed with the agreement, it will enter into a Contract with the selected Responder or Responders. The County intends to use its Standard Personal Services Agreement (PSA), attached to this RFP (in ATTACHMENTS) as a template for the Contract. Certain terms of the County's Standard Personal Services Agreement (PSA) template are subject to negotiation and completion once the successful Responder(s) is/are selected. The County may, in its sole discretion, agree to modify a term that is otherwise not subject to negotiation.

Upon negotiation of the contract, the chosen responder must agree to receive electronic payments, and will be required to complete the ACH/Direct Deposit Authorization form.

The Contract will be for a term not to exceed 12 months.

The County will treat all information submitted in a proposal as available for public inspection once the County has completed negotiations with a contractor. If you believe that you have a legally justifiable basis under the California Public Records Act (Government Section 7920 et. seq.) for protecting the confidentiality of any information contained within your proposal, you must identify any such information, together with the legal basis of your claim in your proposal.

7. RFP PROCESS, PROPOSAL FORMAT & GENERAL INFORMATION

7.1. INQUIRIES

To make inquiries regarding this RFP, Responders may contact only the RFP Contact and are specifically directed not to contact other County officers, employees, or agents on any matter related to this RFP. Failure to comply with the preceding sentence may result in a Responder being barred from consideration under this RFP. For purposes of this section of this RFP, the word “officer” does not include members of the Shasta County Board of Supervisors.

Any Responder who attempts to influence the RFP process by interfering or colluding with other Responders and/or with any County officer, employee, or agent; or who deviates from the RFP process as set forth in the requirements, or terms and conditions of the RFP, may be disqualified at any time from further participation in the RFP process.

Responder(s) shall submit all inquiries regarding this bid via the County e-Procurement Portal, located at <https://procurement.opengov.com/portal/shastaca>. Please note the deadline for submitting inquiries. All answers to inquiries will be posted on the County e-Procurement Portal. Responder(s) may also click “Follow” on this bid to receive an email notification when answers are posted. It is the responsibility of the Responder(s) to check the website for answers to inquiries.

7.2. PROPOSAL FORMAT & CONTENT

Responses to this Request for Proposals must include a complete electronic [PROPOSAL RESPONSE](#).

7.3. EVALUATION CRITERIA AND PROCEDURE

- A. The Contract, if awarded, will be awarded to the Responder or Responders submitting the Proposal(s) deemed, by the County, in its sole discretion, to be in the best interest of the County. The County is not required to enter into a Contract with the particular Responder who submits the least costly Proposal. If only one Responder submits a Proposal, the County may, at its sole discretion, enter into negotiations with that Responder or terminate the RFP process.
- B. Failure to fully comply with all of the requirements of this RFP and to provide all requested information may result in the Proposal being rejected and given no consideration. The determination of compliance with the terms and conditions of this RFP will be in the County’s sole judgment and its judgment will be final and conclusive.

- C. Should more than one Responder submit a Proposal, the following evaluation process will be used to select the Contractor. The factors such as, but not limited to, the following will be considered in the evaluation process: See [EVALUATION PHASES](#).
- D. After receiving the Proposals, the County may schedule interviews at its sole discretion with some or all of the Responders and may establish a ranked list of the Proposals. The Responder receiving the highest ranking may be asked to enter into the Contract negotiation stage.
- E. If an agreement to enter into a Contract cannot be reached with the Responder receiving the highest ranking, then the negotiations with that Responder will be terminated. Negotiations may then be opened with the next ranked Responder and the process repeated, or the County may elect at any time to reject all submitted Proposals and terminate this RFP process. Once negotiations with a particular Responder are terminated, the County will not reopen negotiations with that Responder.
- F. Notwithstanding anything to the contrary in this RFP, the County reserves the right to award the Contract to the Responder(s) whose Proposal is determined by the County, in its sole discretion, to be in the best interest of the County. The County is not required to award the Contract to the Responder that submits the least costly Proposal. Furthermore, the County reserves the right to award one or more Contracts to one or more Responders as a result of this RFP.
- G. If a Responder is selected and the County intends to enter negotiations with that Responder, the County will issue a written Notice of Intent to Award. The County shall consider any protest or objection, from qualified responders, to the Contract award pursuant to this RFP provided that it is submitted in writing and received by the County's contact person at the address listed in this RFP within 10 calendar days of the date stated on the County's written Notice of Intent to Award a Contract. The protest shall identify all basis on which the protest is based. Any protest or objection will be considered and resolved by the Director of Support Services, or their designee, in their sole discretion and whose decision shall be final and conclusive. The Contract may be executed by the County after the expiration of the time period to protest or object, or after a final decision on any protest or objection, whichever is later.

7.4. SUBMISSION OF RESPONSES

Responses shall be submitted electronically via <https://procurement.opengov.com/portal/shastaca>.

All responses must be submitted no later than the exact Closing Date and time indicated on this Request for Proposals.

Proposals may be modified or withdrawn at any time prior to the RFP closing Date and time by an authorized representative of the Responder. Each Responder warrants and represents that the information provided in the Responder's Proposal shall remain unchanged for the time period as indicated on the Attachment Proposal Summary and Certifications. Responder acknowledges that County will be relying on the information contained in the Proposal.

7.5. USE AND DISCLOSURE OF PROPOSALS

- A. The County reserves the right to retain all Proposals that are submitted and to use any ideas in a Proposal regardless of whether a Proposal results in a Contract. All Proposals become the exclusive and sole property of the County. The County will not reimburse Proposal preparation or submission expenses or costs, all of which are the Proposer's sole responsibility.
- B. Unless otherwise compelled by a court order or other legal authority, the County will not disclose any Proposal while the County reviews and evaluates Proposals and engages in negotiations with one or more Responders. However, after the County either issues a Notice of Intent to Award or the County issues a written notice of termination of the RFP process, the County shall consider each Proposal and related documents a matter of public record and subject to the public disclosure requirements of the California Public Records Act (California Government Code sections 7920, et seq.), unless there is a legal exception to public disclosure.
- C. If a Responder believes that any portion of its Proposal is subject to a legal exception to public disclosure, the Responder shall: (1) clearly mark the relevant portions of its proposal "Confidential"; and (2) identify the legal basis for exception from disclosure. By submitting a Proposal, a Responder agrees that County shall not in any way be liable or responsible for the disclosure of any Proposal or any part thereof if disclosure is pursuant to the Public Records Act or otherwise pursuant to law or legal process. By submitting a Proposal, the Responder agrees to save, defend, keep, hold harmless, and fully indemnify County, its elected officials, officers, employees, agents and volunteers from all damages, claims, costs, or expenses, whether in law or in equity, that may at any time arise for not disclosing any portion of a Proposal marked "Confidential" to a third party.
- D. The County will treat all information submitted in a proposal as available for public inspection once the County has completed negotiations with a Responder. If a Responder believes that they have a legally justifiable basis under the California Public Records Act (Government Section 7920 et. seq.) for protecting the confidentiality of any information contained within their proposal, they must identify any such information, together with the legal basis of their claim in their proposal.
- E. Initiation of this RFP does not commit the County to finalize a Contract with any Responder or to be bound by any Proposal. The County shall not be liable for any costs related to the preparation and submission of a Proposal, costs related to the negotiation process, and/or costs otherwise incurred by any Responder related to this RFP process. All such costs shall be borne by the Responder(s).
- F. Notwithstanding any other provisions, the County reserves the right, in its sole discretion to:
 - 1. Accept or reject any or all Proposals, or any part(s) thereof;
 - 2. Reject any Proposal for failure to submit the Proposal in conformity with the requirements, or the terms and conditions, of this RFP;

3. Waive any informalities or irregularities in a Proposal, or to waive any deviations from the requirements, or terms and conditions of this RFP, if deemed to be in the best interest of the County;
 4. Negotiate with a Responder or Responders;
 5. Solicit new proposals on the same Project or on a modified project which may include portions of the original proposed Project as in the best interest of the County;
 6. Terminate, in part or its entirety, the RFP process.
- G. Any Responder submitting a Proposal understands and agrees that submission of their Proposal shall constitute acknowledgment and acceptance of, and intent to comply with, all the requirements, and terms and conditions of this RFP.
- H. The County shall not be liable for, and by submitting a Proposal the Responder agrees not to make any claims for, or have any right to, damages because of any misunderstanding or misrepresentation of the requirements, or terms and conditions, of this RFP, or because of any misinformation or lack of information.
- I. In the event it becomes necessary to revise any part of this RFP, an addendum will be published. Responders will be notified of Addendum(s) automatically by following this procurement.

7.6. SANCTIONS

All qualified Shasta County bidders and responders are hereby notified that under the Executive Order (EO) that as a vendor, consultant, contractor, or grantee, compliance with the economic sanctions imposed in response to Russia's actions in Ukraine is required, including with respect to, but not limited to, the federal executive orders identified in the EO and the sanctions identified on the U.S. Department of the [Treasury website \(https://home.treasury.gov/policy-issues/financial-sanctions/sanctions-programs-and-country-information/ukraine-russia-related-sanctions\)](https://home.treasury.gov/policy-issues/financial-sanctions/sanctions-programs-and-country-information/ukraine-russia-related-sanctions).

Failure to comply may result in the termination of contracts or grants, as applicable.

8. EVALUATION PHASES

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Background and Experience	0-10 Points	30 (30% of Total)
2.	Approach to the Scope of Work	0-10 Points	30 (30% of Total)
3.	Technical Capabilities	0-10 Points	25 (25% of Total)
4.	Pricing	0-10 Points	15 (15% of Total)

9. PROPOSAL RESPONSE

9.1. Company History and Background *

Provide a narrative regarding the history and background of your company, including the number of years in business, organizational structure, and the number of full-time staff dedicated to providing relevant services and data analysis. Resumes are not desired.

*Response required

9.2. Relevant Experience with Local Governments*

Outline your company's background and experience working with local governments, with a focus on California. Highlight relevant experience in community engagement, particularly projects aimed at producing a Strategic Plan.

*Response required

9.3. Approach to Scope of Work*

Describe your approach to fulfilling each element outlined in the Scope of Work. This should demonstrate a clear understanding of the project, a proposed timeline for implementation, the human resources required from the County, and a phased approach to successfully completing the engagement process.

*Response required

9.4. Technical Capabilities*

Discuss any technical capabilities used to conduct community engagement and opinion polling, including specific tools, platforms, or methodologies that will be employed during the project.

*Response required

9.5. Data Delivery and Presentation*

Explain how written data will be provided to the County, including the format and structure. Additionally, discuss any requirements for providing oral presentations that will be required to deliver findings and ensure the results are clear and actionable.

*Response required

9.6. Pricing *

Please provide billable hourly rates for staff involved in the provision of services and anticipated hours to complete the Scope of Work as provided. Contract will provide for invoicing for actual time worked with a not to exceed provision.

Provide billable costs for any ancillary and/or administrative fees.

Travel will be reimbursed at actual costs and conducted in the most cost-effective means possible.

*Response required

9.7. Insurance

9.7.1. *Do you agree to provide all required insurance policies including but not limited to Commercial General Liability with limits of \$2 million per claim and \$4 million aggregate, Professional Errors and Omissions with \$2 million per occurrence and \$2 million aggregate?**

☐ Yes

☐ No

*Response required

When equals "No"

9.7.2. *If no, please state why.**

*Response required

9.8. Request for Confidentiality of Proprietary Information

If a Responder believes that any portion of its Proposal is subject to a legal exception to public disclosure, the Responder shall: (1) clearly mark the relevant portions of its proposal "Confidential"; and (2) identify the legal basis for exception from disclosure. By submitting a Proposal, a Responder agrees that County shall not in any way be liable or responsible for the disclosure of any Proposal or any part thereof if disclosure is pursuant to the Public Records Act or otherwise pursuant to law or legal process. By submitting a Proposal, the Responder agrees to save, defend, keep, hold harmless, and fully indemnify County, its elected officials, officers, employees, agents and volunteers from all damages, claims, costs, or expenses, whether in law or in equity, that may at any time arise for not disclosing any portion of a Proposal marked "Confidential" to a third party.

9.8.1. Request for Confidentiality of Proprietary Information*

The Responder, by the undersigned representative, requests that the specific information, described below and identified on the page or pages of the response in which it appears, be treated as confidential information and protected from disclosure to the public.

1. Description of specific information that is the subject of the request.

2. The legal basis for exception from disclosure.

Enter N/A if this does not apply.

*Response required

9.9. Statement of Experience

9.9.1. *Business Status**

- ☐ Non-Profit Corporation
- ☐ General Partnership
- ☐ Limited Partnership
- ☐ Corporation
- ☐ Sole Proprietorship
- ☐ Other:

*Response required

9.9.2. *If other/Corporation:**

If you chose Corporation, which State your business is incorporated in?

If you chose Other Entity, please clarify.

*Response required

9.9.3. *Number of years in business under present business name? **

*Response required

9.9.4. *Have you ever used another Business Name?**

- ☐ Yes
- ☐ No

*Response required

When equals "Yes"

9.9.5. *Please state any other business name(s) used and provide the number of years in business under prior business name(s).**

*Response required

9.9.6. *Number of years' experience providing equivalent or related services?**

*Response required

9.9.7. *Contracts completed during the last 5 years:**

Example Format:

Year, Services Provided, Contract Amount, Location, Contracting Agency

*Response required

9.9.8. *Have you, or your agency, failed or refused to complete a contract?**

If yes, please explain in the next question.

☐ Yes

☐ No

*Response required

When equals "Yes"

*9.9.9. Please explain.**

*Response required

*9.9.10. Do you or your agency hold a controlling interest in any other organization, or is this agency or business owned or controlled by another organization or agency? **

If yes, please explain in the next question

☐ Yes

☐ No

*Response required

When equals "Yes"

*9.9.11. Please explain.**

*Response required

*9.9.12. Do you, or your agency, hold or have a financial interest in any other business?**

☐ Yes

☐ No

*Response required

When equals "Yes"

*9.9.13. Please explain.**

Unless you are the individual personally performing contracted services or a governmental agency.

*Response required

*9.9.14. Names of persons with whom you, or your agency, have been associated in business as partners or business associates in the last five years. (Government agencies are exempt) **

If none/exempt please indicate with a N/A

*Response required

*9.9.15. Explain any litigation involving you, your agency, or any principle officer(s) thereof (if applicable):**

If not applicable, please indicate with a N/A

*Response required

9.9.16. *Provide a description of experience in the services to be provided, and the experience of principle individuals who will be performing services: **

*Response required

9.9.17. *List any major equipment to be used for the direct provision of services: **

*Response required

9.9.18. *Most recent audited financial statement**

Please attach a copy of your most recent audited financial statement, for a fiscal period not more than 18 months old at time of submission, by an independent certified public accountant. If one is not available, a profit and loss or similar type income statement in order to demonstrate fiscal stability.

*Response required

9.9.19. *Do you or your agency agree, at the request of the County, to provide letters of credit, and guarantor letters from related entities?**

☐ Yes

☐ No

*Response required

9.9.20. *Please provide a list of commitments, and potential commitments which may impact assets, lines of credit, guarantors letters, or otherwise affect you or your agency's ability to perform:**

If none, please indicate with a N/A

*Response required

9.9.21. *Do you and/or your agency agree to provide additional information as required by the County to make an informed determination of qualifications? **

☐ Yes

☐ No

*Response required

9.9.22. *Do you and/or your agency agree to permit the County, State, and Federal governments to audit financial and other records pertinent to the services provided? **

☐ Yes

☐ No

*Response required

9.10. **Certifications:**

9.10.1. *Comply with specifications**

Do you agree to comply with specifications, RFP instructions, draft Contract requirements and other pertinent references contained in this RFP?

☐ Yes

☐ No

*Response required

9.10.2. Price Hold*

Do you agree that the information and costs provided in the proposal will remain unchanged and will not be withdrawn for a period of 90 days after the submission deadline?

☐ Yes

☐ No

*Response required

9.10.3. Certify Accuracy of Response*

Do you certify that all statements contained within the submitted Proposal are true, and acknowledge that if the Proposal is found to contain any false statements, the County may declare any Agreement or Contract made as a result of the Proposal to be void?

☐ Yes

☐ No

*Response required

9.10.4. Additional Information*

Do you agree to provide the County with any other information the County determines is necessary for accurate determination of your qualifications to provide the requested services?

☐ Yes

☐ No

*Response required

9.10.5. All Costs Included*

Do you certify that the proposal includes all costs incident to the proposed Contract?

☐ Yes

☐ No

*Response required

9.10.6. ACH/Direct Deposit Authorization*

Upon execution of the Contract, the chosen responder must agree to receive electronic payments, and will be required to complete the ACH/Direct Deposit Authorization form, attached herein. Do you agree to be an ACH/Direct Deposit vendor?

☐ Yes

☐ No

*Response required

9.10.7. References*

You give permission for the County to contact any and all references provided.

☐ Yes

☐ No

*Response required