

January 28, 2010

## REQUEST FOR PROPOSALS (DRAFT)

You are invited to submit a proposal to provide assistance to the San Francisco Bay Restoration Authority to complete a public opinion survey and revenue measure feasibility analysis to determine the public's level of support for bay restoration efforts and to determine which kinds of programs receive the most voter support. We are requesting proposals for these services as more fully described in the Services Required section below. **Electronic proposals are due in our office no later than March 1, 2010 at the close of business, 5: 00 P.M.**

The San Francisco Bay Restoration Authority (hereinafter "Authority") was established in August 2008 by the California State Legislature through Assembly Bill 2954 as a regional entity to generate and allocate resources for the protection and enhancement of tidal wetlands and other wildlife habitat in and surrounding the San Francisco Bay. The Association of Bay Area Governments (ABAG) and the Authority have overlapping goals regarding marsh restoration along the San Francisco Bay shoreline and ABAG acts as interim managing staff and fiscal agent for the Authority. Therefore, any contract resulting from this solicitation will be negotiated and administered by ABAG. The Governing Board of the Authority accepted a grant from the San Francisco Foundation to fund this work. Up to \$50,000 is available for this Phase I Survey.

### **Background**

The Authority is charged with restoring the San Francisco Bay's critical tidal wetlands by generating dedicated funding, and then distributing this funding to eligible organizations for specific projects and programs. The Authority's mission is to formulate a strategy for raising local revenues for project implementation and to leverage Federal and State funding. In order to help the Authority make strategic and informed decisions about the current opportunity for a local funding measure, scope of the measure, and the optimal tax/assessment/fee rate, an opinion research survey and revenue measure feasibility analysis are necessary. The survey should evaluate both the opportunity for a funding measure on a region-wide basis, and also on a county-by-county or other sub-area basis.

### **Services Required**

The Phase I effort will provide a public opinion survey designed to:

- (1) Quantify voter concern with Bay quality and Bay wetland restoration compared with other local issues;
- (2) Test voter reaction to a proposed parcel tax, sales tax, or other measure to fund Bay wetland restoration projects;
- (3) Determine whether a region-wide nine-county ballot measure for the parcel tax, sales tax/other measure or a county-by-county ballot measure would be more acceptable;
- (4) Determine the dollar level of support that is likely to garner an excess of two-thirds support from likely voters and the corresponding total annual revenues that could be generated;
- (5) Evaluate voter reaction to potential components of a measure, including language and tax/fee/assessment amount;
- (6) Determine the extent to which voters support general bay wetland restoration as opposed to projects in their own county;
- (7) Assess the extent to which including flood control strengthens or weakens public support.
- (8) The proposal should provide pricing at various opinion sample sizes and describe the differences those sizes make in terms of precision and the ability to segment the results by geography or any other demographic.
- (9) The proposal should provide pricing for alternative survey instruments, i.e. services additional to the seven "baseline" items listed above and describe the advantages afforded by these alternatives.
- (10) The proposal should price options for conducting one or more focus groups.

The study should be designed to develop an overall strategy and timeline for moving forward with a ballot measure. It should not include extensive message testing but should rather focus on the key questions:

- (1) What type of measure might meet with voter approval at the two-thirds level;
- (2) What election timeline is recommended to improve likelihood of success;
- (3) How much of a privately funded campaign effort is likely to be required.

The Contractor is expected to brief the Governing Board of the Authority and its Advisory Committee as requested and incorporate their input in both the survey and in the feasibility analysis.

### **Time Frame**

The time frame for completion of this work is anticipated to be 6 months.

### **Compensation**

Up to \$ 50,000 is available for this work. The Contractor must be an independent contractor. No benefits are provided. Contractor is responsible for payment of applicable state and federal taxes. Contractor must provide the necessary equipment to perform required work.

### **Selection Procedure**

Every proposal will be evaluated according to the criteria below.

1) Qualifications and Experience - The Contractor will be evaluated based on the level of experience and background in performance of similar projects. Qualifications should include expertise in the following:

- Public opinion research
- Revenue measure formation services including assessment districts, parcel taxes
- Developing financial feasibility studies

2) Proposal - The Contractor will be evaluated based on the adequacy of the submitted approach to complete the public opinion survey and revenue measure feasibility analysis as outlined in this Request for Proposal.

3) Cost

### **Additional Requirements:**

- Proposals must respond to all the requirements of the RFP, and must include all information specifically required in all sections of the RFP.
- Award of contract may not be made to any Contractor unless an agreement can be secured for all general and special contract provisions.
- Award will not be made to a Contractor whose proposed period of performance is not within a period of time acceptable to the Authority.

### **Contract Award**

Contract award shall be made to the responsible Contractor whose proposal is most advantageous to ABAG and the Authority, evaluation factors, costs, and other factors, considered. Our objective is to obtain the highest qualified contractor to achieve the objectives within a realistic time frame and reasonable cost. Qualifications and experience as a whole are more important than cost.

This RFP does not commit ABAG to award a contract. We reserve the right to reject any or all proposals

received in response to this request.

### **Applications**

We invite individuals and organizations to work with us. The contract funded by this RFP is expected to start April 1, 2010.

### **What to Submit**

To provide an objective, fair review of all proposals, the submittals are to include only the following information:

- 1) Transmittal Letter - Normal transmittal letter, covering highlights and unique features of your proposal. Any special terms and conditions of the offer should also be summarized in this portion of the proposal. Letter should include your office address.  
Length: **One (1) page maximum.**
- 2) Statement of Work - Provide a definitive proposal to accomplish the requirements as stated in this RFP. This must describe in detail the procedures and methods that will be used to achieve the stated goals of the project, preferably drawing on past experience/ work conducted by the applicant. A proposed timeline and clear delineation of general tasks, products, and expected completion dates must also be included.  
Length: **Two (2) pages maximum.**
- 3) Relevant Experiences - Provide a summary of relevant experience over the last 5 years.  
Length: **Two (2) page maximum.**
- 4) List of Client References - Provide a list of clients to be used as references for your work, including contact name, address, telephone number, nature of job, length of engagement, amount (e.g. 1 year, \$ 30,000).  
Length: **One (1) page maximum.**
- 5) Budget - Must include total funds requested and amount budgeted per task. Provide billing rates for project personnel and any subcontractors, including overhead, other direct or out of pocket costs should be called out in the budget.  
Length: **One (1) page maximum.**
- 6) Examples of Work - Provide one or two examples of comparable survey work that clearly demonstrate your expertise.

We require an electronic copy of your proposal package sent to Paula Trigueros at [ptrigueros@waterboards.ca.gov](mailto:ptrigueros@waterboards.ca.gov). **Proposals are due no later than March 1, 2010 at the close of business, 5:00 P.M.**

Questions may be directed to Paula Trigueros at (510) 622-2499.

## San Francisco Bay Restoration Authority- Possible Firms for RFP Receipt

1. Bartle Wells Associates  
1889 Alcatraz Avenue  
Berkeley, CA 94703  
Email: [bwa@bartlewells.com](mailto:bwa@bartlewells.com)
2. EMC Research  
436 14<sup>th</sup> Street, Suite 820  
Oakland, CA 94612  
Email: [info@emcresearch.com](mailto:info@emcresearch.com)
3. NBS-Local Government Solutions  
870 Market Street, Suite 1223  
San Francisco, CA 94102  
Email: [ContactNBS@nbsgov.com](mailto:ContactNBS@nbsgov.com)
4. SCI Consulting Group  
4745 Mangels Boulevard  
Fairfield, CA 94534  
Email: [info@sci-cg.com](mailto:info@sci-cg.com)
5. San Francisco State University  
Public Research Institute  
Attn: Diane Godard, Project Coordinator  
1600 Holloway Ave  
San Francisco, CA 94132-4025  
Email: [dmgodard@sfsu.edu](mailto:dmgodard@sfsu.edu)
6. Catapult Strategies  
300 South 1<sup>st</sup> Street  
San Jose, CA 95113-2836  
Email: [jude@getcatapult.com](mailto:jude@getcatapult.com)
7. David Binder Research  
44 Page Street, Suite 404  
San Francisco, CA 94102  
Email: [info@db-research.com](mailto:info@db-research.com)
8. Lake Research Partners  
1936 University Ave, Suite 300  
Berkeley, CA 94704  
Email: [info@lakeresearch.com](mailto:info@lakeresearch.com)
9. Fairbanks, Maslin, Maullin, Metz & Associates  
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