



REQUEST FOR PROPOSALS
**Surfing Museum Interior Renovation &
Exhibit Development**

**Proposals Due:
Friday, September 4, 2015 by 5:00 pm (PST)**

Project Description

The Parks & Recreation Department of the City of Santa Cruz seeks proposals for the interior renovation and exhibit development for the Santa Cruz Surfing Museum located at the Mark Abbott Memorial Lighthouse, 701 West Cliff Drive, Santa Cruz, CA 95060. The interpretive design portion of this project may include planning for additional exhibit enhancements and future use of space in the museum. The goal of the project is to create a working plan for space utilization; provide consultation on design; and to renovate the existing space to improve functions for exhibits and museum operations.

Deliver Proposals to:
City of Santa Cruz
Parks & Recreation Department
c/o Surfing Museum Project
323 Church Street
Santa Cruz, CA 95060

For More Information:

The Request for Proposals document, dated **July 10, 2015**, may be downloaded from the City's website. For additional information or assistance, contact Tremain Hedden-Jones | Project Coordinator, at (831) 420-6182, FAX 831/420-6457, email tjones@cityofsantacruz.com.

The City reserves the right to reject any or all proposals and waive any informality or minor defects in proposals received.

1. GENERAL INFORMATION FOR CONSULTANTS

1.1 Summary Scope of Work

The Parks & Recreation Department of the City of Santa Cruz (City) is soliciting proposals for exhibit design and implementation at the Santa Cruz Surfing Museum (Museum). The intent in soliciting proposals is to obtain cost savings through a competitive process while maintaining an acceptable quality in design and installation service. The highest priority in regards to design is to consider functionality and future updates.

The City is seeking a consultant or consultant team to create an interpretive plan for exhibit development for the Museum. The proposal should describe the scope of services the consultant proposes to provide regarding the following outcomes:

Interpretive Plan

- a. Develop main interpretive theme and subthemes
- b. Develop an interpretive storyline flow chart.
- c. Develop with City staff specific objectives of interpretive areas including:
 - i. Learning objectives
 - ii. Behavioral objectives
 - iii. Emotional objectives
- d. Develop total interpretive program/services objectives
- e. Conduct a focus group workshop with staff and stakeholders to determine/re-affirm the main interpretive theme and sub-themes of the total interpretive message presentation
- f. Identify partners, sponsors, stakeholders and provide outreach for input as needed

Exhibit Design

- a. Assess the identified exhibit space
- b. Develop a passive exhibition design
- c. Provide consideration and recommendation to rotation of pieces from the collection

Installation

- a. Fabricate the project
- b. Implement renovation specifications
- c. Coordinate with subcontractors or in-house staff to project completion

Renovation

- a. Design specifications for efficient use of interior space
- b. Coordinate with builders to implement design

1.2 Background

Located in the Mark Abbott Memorial Lighthouse, the Santa Cruz Surfing Museum opened its doors in June 1986 as the first surfing museum in the world. The lighthouse was originally built in 1967 as a memorial to resident surfer Mark Abbott, who died while surfing at nearby Pleasure Point.

The Museum overlooks iconic surfing hotspot, Steamer Lane and features photographs, surfboards, and collectables that trace over a century of surfing history in Santa Cruz. The Santa Cruz Surfing Club Preservation Society is a partner organization that assists with maintaining the cultural heritage of surfing in the greater community. The Santa Cruz Museum of Natural History is also a partner and manages retail operations for the Museum.

Since its inception, the Museum has had minimal work done to the interior design or overall exhibit presentation. While the City has provided general scheduled maintenance of facility overall, the Museum does not currently have

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a permanent curatorial staff and regularly relies on volunteer assistance from Preservation Society members and other stakeholders to address issues with exhibition.

As of today, exhibits at the museum explore the origins of surfing in Hawaii with linkages to the adoption of surfing in Santa Cruz. Photographs chronicle the evolution of surfing culture in Santa Cruz from the 1930s to the present. In addition, examples of surfboards from each era are on display and include hollow paddle boards, redwood planks, prototypes of early foam and fiberglass boards, and short boards that can be used to create radical surf maneuvers.

1.3 Project Budget and Size

The Surfing Museum has approximately 750 sq. ft. of floor space used for both exhibits and retail operations. The budget for this project is \$49,000 to include design, fabrication, installation and renovation.

1.5 Contact

If you have any questions concerning this solicitation, please call contact Tremain Hedden-Jones, Project Coordinator, at (831) 420-6182, FAX (831) 420-6457, email tjones@cityofsantacruz.com. To learn solicitation results, call Tremain Hedden-Jones after the due date.

1.6 Proposal Deadline

Proposals are due no later than Friday, September 4, 2015 by 5:00 pm and can be delivered to 323 Church Street, Santa Cruz, California, 95060 before the due date. Late proposals will not be considered.

Consultants will deliver one unbound original of the proposal in a sealed envelope before the due date and will email a *copy* of the proposal and any attachments to tjones@cityofsantacruz.com on or before the next business day after the due date. The City prefers for proposals to be printed on recycled paper and bound in an easily recyclable format. Email submissions will not be accepted if the corresponding unbound original is not submitted before the due date and time.

1.8 Proposal Evaluation and Award

A contract for **Surfing Museum Interior Renovation & Exhibit Development** will be awarded based on the following criteria:

1. Proposal is responsive when received on time and completed per instructions;
2. Proposal is compliant with project specifications in addition to the standards and best practices as established by the American Alliance of Museums (AAM);
3. Consultant is offering the lowest overall price for the best value (best value methodology detailed in section 3 of this solicitation);
4. Consultant is responsible; City may consider:
 - a. Possession of industry standard licensing and/or certifications;
 - b. Financial responsibility;
 - c. Years of experience;
 - d. Adequacy of equipment; and
 - e. Past performance; and
 - f. References.

A Consultant's failure to promptly respond to City's inquires for proposal clarification may result in determination of non-responsibility.

The contract will be awarded on an all or nothing basis and is tentatively scheduled to begin in **October 2015**.

Consultants have the right to take exception to the specifications or terms to this solicitation. Any exceptions taken must be explained in the proposal. Any exceptions that contradict the City's terms and conditions, or contain provisions that are not in the best interest of the City will disqualify the Consultant. If exceptions are not explained, the Consultant will comply with the specifications as stated in this solicitation.

The City reserves the right to reject any or all proposals and waive any informality or minor defects in proposals received.

1.9 Organization of this RFP Document

The Request for Proposals (RFP) is organized in these sections:

Section 1- General Information to Consultants: Contains summary scope of work, contact information, proposal due date, and general background information.

Section 2- Specifications: Provides details regarding the contract requirements.

Section 3- Process Instructions: Contains the tentative RFP schedule, explains how the proposals will be evaluated, and presents administrative information on the conduct of the RFP process.

Section 4- Terms and Conditions: Details the City's contract terms and conditions.

Section 5- Proposal Cover Page: Provides basic Consultant contact information and an authorized signature accepting the City's terms and conditions as stated in this solicitation.

Section 6- RFP Questionnaire: Presents questions for Consultant response.

Section 7- Fee Schedule: Provides format for submitting pricing. Fee Schedules will include all costs incidental to performing the **Surfing Museum Interior Renovation & Exhibit Development** according to this solicitation.

Appendix A- Local Business Preference Certification

SECTION 2: SPECIFICATIONS

2.1 Project Overview

The successful Consultant will complete an assessment of the interpretive value of various elements and resources of the Museum. The Consultant is responsible for furnishing all labor, materials, tools, equipment, and methods required to prepare an interpretive plan, exhibit development and interior renovation.

The City anticipates the following general tasks:

Task 1: Attend a pre-meeting with City staff and associated stakeholder representatives to visit the site and explain the scope of work, schedules, and define the standards to be met. City staff may direct the consultant to existing City resources, City records, and research files on the Santa Cruz Surfing Museum.

Task 2: Evaluate the interpretive potential and best interpretive models for the Museum. Provide an assessment of the range of interpretive stories and themes it can convey and audiences it could serve with recommendations based on analysis of those stories/themes which would have the broadest appeal. The recommendations should include the unique historical elements, staff and visitor interactions and exhibits including furnishings, displays, and an evaluation of the potential role of technology in implementing the recommendations or interpretation. An assessment of the benefits, challenges, and up-front and annual costs of the recommendations should be included.

Task 3: Consult with staff and other community leaders who can provide input to develop a profile of community and visitor information through key stakeholder planning sessions and other sources.

Task 4: Prepare and submit draft Museum work plan to the City for review.

Task 5: Implement work plan in coordination with Museum stakeholders and City staff.

2.2 Responsibilities of Consultant

The successful consultant will establish a work plan and schedule to ensure timely completion of each phase of the project. The schedule shall be prepared by the consultant and submitted in reproducible form and discussed with City staff before a final schedule can be approved. Regular meetings, updates, and phone calls and emails with the project team are essential for ongoing communications.

The consultant will be responsible for reviewing existing research and materials related to the Santa Cruz surfing community, including general historic information, images, and past and current reports related to the Museum and Santa Cruz Surfing Preservation Society. The assessment will evaluate the interpretive potential of the Museum and provide recommendations for engaging and relevant interpretive planning.

2.2 Responsibilities of City

The City will be responsible for providing a comprehensive list of expectations based on outcomes, targets and budgetary needs. In addition, the City will assist in organizing stakeholders and scheduling facilities for related meetings.

2.3 Basic Qualification of Consultant

Consultant must be able to consult on developing exhibits based upon demonstrative ability to: 1) establish appropriate themes and concepts; 2) conduct curatorial research; 3) design and produce quality interpretive displays; 4) determine basic market profile; and 5) integrate stakeholder input into final product.

2.8 Installation

Implementation of the final design for exhibits at the Museum will require careful consideration of handling the Museum's collection of valued artifacts. In addition, other geographic constraints may impact installation. Consultants will coordinate logistics and construction work with City staff.

2.9 Damage

The Consultant will be responsible for any damage to City property during the performance of this contract. In the event that there is damage to City property, the Consultant will immediately report the incident to the City in writing. Any such damage will be repaired or replaced with same by the Consultant at his/her expense and to the satisfaction of the City.

2.12 Warranty

Consultant warrants that the item(s) provided and/or work performed under this contract comply with all specifications, are free of liens and encumbrances, and that workmanship and materials are free from defects. Work will comply with nationally recognized codes and established industry standards. Equipment will carry the manufacturers' most favorable commercial warranties. The warranty period will begin after acceptance of item(s) and/or work.

Consultant agrees to remedy by replacing or repairing any item(s) that is damaged or defective during normal usage within the warranty period, at no additional cost to the City. Such repair or replacement will occur within a reasonable time frame, to the satisfaction of the City.

Exceptions to any of these warranty provisions will be indicted by Consultant in their proposal.

2.14 Consultant's Employee Conduct

Consultant will agree to remove any employee whose conduct is improper, inappropriate, or offensive as determined by the City. A removed employee(s) is not to work on City premises without the written consent of the City. The Consultant will remove any employee from working in, or delivering to a City facility that is convicted of a felony during his/her employment.

2.18 Exclusions

Excluded from this specification are all items purchased separately on other City contracts. The City also reserves the right to bid separately any item or items where it is determined by the Purchasing Manager that:

1. A substantial savings in cost will result due to a large quantity purchase, or
2. The commodity is not appropriately classified under this specification contract.

3: PROCESS INSTRUCTIONS

3.1 RFP Schedule

The City will make every effort to adhere to the following schedule:

| Action | DATE |
|-------------------------------------|----------------------------|
| 1. Issue RFP | July 10, 2015 |
| 6. Proposal due date | September 4, 2015 |
| 7. Oral presentations for finalists | Week of September 14, 2015 |
| 8. Proposal evaluation completed | Week of September 24, 2015 |
| 9. Notice of intent to award | September 28, 2015 |

3.2 Proposal Format

Proposals are due no later than Friday, September 4, 2015 by 5:00 pm and can be delivered to the Parks and Recreation Administrative Office located at 323 Church Street, Santa Cruz, California, 95060 before the due date. Late proposals may not be considered.

Consultants will deliver one unbound original of the proposal in a sealed envelope before the due date and will email a copy of the proposal and any attachments to tjones@cityofsantacruz.com on the next business day after the due date. The City prefers for proposals to be printed on recycled paper and bound in an easily recyclable format. Email submissions will not be accepted if the corresponding unbound original is not submitted before the due date and time.

The City will not be liable for any expenses incurred by Consultants responding to this solicitation.

Proposals should be organized as follows:

1. **RFP Cover Page, Section 6:** Provides basic Consultant contact information and an authorized signature accepting the City's terms and conditions as stated in this solicitation.
2. **Consultant Response to RFP Questionnaire, Section 7:** Answers should be complete and in the order presented. Make your proposal as short as possible and do not include generic marketing materials.
3. **Fee Schedule, Section 8:** Provide complete pricing for all items listed. Include all possible costs. Consultant will not be allowed to charge for costs not included in the proposal.
4. **Optional Appendices or Exhibits:** Consultants may include sample reports, peer review reports, letters of recommendation, or other exhibits that may assist the City in favorably evaluating the Consultant. Do not include generic marketing materials.

Consultants have the right to take exception to the specifications or terms to this solicitation. Any exceptions taken must be explained in the proposal. Any exceptions that contradict the City's terms and conditions, or contain provisions that are not in the best interest of the City will disqualify the Consultant. If exceptions are not explained, the Consultant will comply with the specifications as stated in this solicitation.

3.3 RFP Addenda

The City may determine it is necessary to revise any part of this solicitation. Revisions will be made by written addenda and it is the Consultant's responsibility to comply with any addenda to this solicitation. Any addenda will be:

- Emailed to known interested Consultants; Or
- Posted on the City's website, www.cityofsantacruz.com, under Bidding Information; Or
- Consultants may contact Tremain Hedden-Jones, Project Coordinator, at 831/420-6182, FAX 831/420-4257, email tjones@cityofsantacruz.com.

3.4 Proposal Evaluation

RFP responses will be evaluated and ranked according to the criteria below by an Evaluation Committee. The Evaluation Committee will review the proposals in confidence. Proposals will be available to the public after contract award.

| <u>Criteria</u> | <u>Weight</u> |
|---|---------------|
| 1. Consultant's qualifications, experience and references | 20% |
| 2. Fee schedule (pricing) | 15% |
| 3. Consultant's proposed work plan | 20% |
| 4. Creativity, innovation, and proposed use of space | 35% |
| 5. Overall quality of proposal | 10% |

3.4.1 Proposal Evaluation Criteria Definitions

a. Consultant's qualifications, experience and references (20%)

Proposals will be evaluated for the Consultant's qualifications, experience and references. The criteria will also include an evaluation of the Consultant's organizational longevity, projected financial stability, and performance on similar contracts.

b. Fee schedule (pricing) (15%)

The total cost of the contract will affect 25% of the overall evaluation. Proposed fees will be presented as not-to-exceed costs for the contract term and will include all professional fees and expenses.

c. Consultant's proposed work plan (20%)

Proposals will be evaluated on the Consultant's ability to provide consulting services for exhibit development and space use at the Museum. City staff will evaluate proposals that provide sufficient detail in all elements of the project from initial phases to completion.

d. Creativity, innovation and proposed use of space (35%)

Proposals will be evaluated for the Consultant's creative use of museum resources; approach to layout and interior design; and innovative use of space.

e. Overall Quality of Proposal (10%)

Proposals will be evaluated for their professionalism and attention to detail. Consultants should answer all questions referenced in Section 7 and in the order they are presented.

3.5 Contract Implementation

The contract resulting from this solicitation is tentatively scheduled to begin in **October 2015**. Upon award notification and prior to final contract approval, the successful proposer will be required to submit:

- a. Proof of insurance and living wage ordinance compliance documentation as specified in section 4.1 and 4.4 of this solicitation;
- b. Documentation of all credentials necessary to legally perform the services specified;
- c. A completed W9 form and, if applicable, non-resident withholding exemption form, if not already on file with the City; and
- d. Proof of a current City of Santa Cruz business tax certificate if the Consultant is located in, or performs services within, the city limits for more than 6 days annually.

The finalized contract will include the RFP Section 2, the RFP Section 4, the Consultant's response to Section 6 (RFP Cover Page), the Consultant's response to Section 7 (RFP Questionnaire), the Fee Schedule as described in Section 8, the City's standard terms as Exhibit A, and any negotiated modifications agreed to by the parties.

3.6 Public Record

Proposals received will become the property of the City. All proposals, evaluation documents, and any subsequent contracts will be subject to public disclosure per the "California Public Records Act," California Government Code, sections 6250 – 6270. All documents related to this solicitation will become public records once discussions and negotiations with proposers have been fully completed and an award has been announced.

Appropriately identified trade secrets will be kept confidential to the extent permitted by law. Any proposal section alleged to contain proprietary information will be identified by the proposer in boldface text at the top and bottom as "PROPRIETARY." Designating the entire proposal as proprietary is not acceptable and will not be honored. Submission of a proposal will constitute an agreement to this provision for public records. Pricing information is not considered proprietary information.

3.7 Award Protests

The City desires to foster cooperative relationships with Consultants and to reach a fair agreement in a timely manner.

The City encourages Consultants to resolve issues regarding the solicitation requirements or the procurement process through written correspondence and discussions at least 5 business days prior to the proposal due date. This will allow the City time to research the validity of the protest and either issue an addendum to the solicitation, cancel the solicitation, or determine the protest to be unfounded and proceed with the solicitation. In the event the protest of specifications is denied and the protester wishes to continue in the protest process, the protesting Consultant must still submit a proposal in accordance with the proposal submittal procedures provided in this solicitation. Questions or concerns prior to the intent to award notice will be directed to:

TREMAIN HEDDEN-JONES
phone: (831) 420-6182, fax: (831) 420-6457,
or email: tjones@cityofsantacruz.com

Any unsuccessfully bids on a city contract or any trade association representing workers who would have potentially been employed by such contract may formally protest a contract award. Protests letters regarding an informal contract award will be directed to:

City of Santa Cruz
Dannettee Shoemaker
Director of Parks & Recreation
323 Church Street
Santa Cruz, California 95060

Protests regarding the contract award must be received no later than 5 business days after the written notice of intention to award has been distributed. The award protest must be in writing and include:

- The name, address, and telephone number of the protester;
- The solicitation title and due date;
- A detailed statement of the legal and/or factual grounds for the protest; and
- The form of relief requested.

Throughout the protest review process, the City has no obligation to delay or otherwise postpone an award of a contract.

Protests regarding the award resulting from this solicitation must be delivered to **the Parks & Recreation Department, Dannettee Shoemaker; Director** within 5 business days after the written notice of intention to award is distributed. The **Director** will review the protest and issue a written response within 10 business days. The decision of the **Director** will be final.

4. TERMS AND CONDITIONS

4.1 City's Standard Terms and Conditions

The City of Santa Cruz standard terms and conditions shall govern this contract. Review the terms and conditions at <http://www.cityofsantacruz.com/terms>; all terms including, but not limited to, insurance apply to the contract resulting from this solicitation. A current copy of these terms will be included in the resulting contract as an Exhibit. A hard copy of the terms and conditions are available by contacting the Purchasing Division at 831/420-5080.

4.1.1 Insurance Requirements

Consultant will provide Certificate of Insurance(s) for Commercial General Liability, Auto Liability, and Workers' Compensation as stated in the City's standard terms and conditions.

4.1.2 Prevailing Wage

Prevailing wages must be paid to all workers and subcontracted employees for this contract. This contract is subject to compliance monitoring and enforcement by the DIR. Contractors and subcontractors must register with the DIR in order to submit a bid and be awarded a contract. (<http://www.dir.ca.gov/dlse/dlsePublicWorks.html>)

4.2 Liquidated Damages

Time is of the essence. If delivery is not completed by the time required by the resulting contract, the Consultant acknowledges and agrees that such delay would seriously affect the public welfare and the operation of the City and that damage for such delay would be impracticable or extremely difficult to determine. The parties agree that the sum of \$XX.00 per day for each day of delay will be fixed as liquidated damages (and not as a penalty or forfeiture for breach).

To the extent that any delay is a result of matters or circumstances wholly beyond the control of the Consultant, the time of completion may be extended for such period as agreed between the parties. The City may, at the time of acceptance of the work, waive liquidated damages.

4.3 Term of Contract

The term of the contract will commence upon notification of award and continue for a period of one year, plus any renewals agreed to by the parties.

4.4 Contract Renewal

At the option of the City, this contract may be renewed annually under the same contractual terms and conditions and at the same price or price basis.

4.4.1 Price Adjustments

Pricing will remain firm for the first year of the contract. One price increase may be considered annually, on the anniversary date of the contract, as a result of:

- Supply price increases to the Consultant;
- Increases in Government or regulatory agency taxes, charges, or fees specific to the Consultant's trade;
or
- Increases in the previous 12 month Consumer Price Index (all items, not seasonally adjusted, for all urban consumers) for San Francisco-Oakland-San Jose.

Any request for a price increase will be substantiated with documentation from a manufacturer or government agency and will be submitted by the Consultant in writing. The City will be the sole judge of acceptable price increases and the City may cancel the contract if a requested price increase is not acceptable.

SECTION 5: PROPOSAL COVER PAGE

1. Proposal Deadline

Proposals are due no later than September 4, 2015 by 5:00 pm and can be delivered to 323 Church Street, Santa Cruz, California, 95060 before the due date. Late proposals may not be considered. Consultants will deliver one unbound original of the proposal in a sealed envelope before the due date and will email a copy of the proposal and any attachments to tjones@cityofsantacruz.com on the next business day after the due date. The City prefers for proposals to be printed on recycled paper and bound in an easily recyclable format. Email submissions will not be accepted if the corresponding unbound original is not submitted before the due date and time.

2. Proposal Response Sheet

The undersigned, upon acceptance, agrees to furnish the following in accordance with the specifications and terms and conditions per City of Santa Cruz Request for Proposals for Surfing Museum Interior Renovation & Exhibit Development dated July 10, 2015, at the prices indicated herein.

The undersigned, under penalty of perjury, declares not to be a party with any other business to an agreement to bid a fixed or uniform price in connection with this proposal.

The unsigned declares under penalty of perjury that she/he is authorized to sign this document and bind the business or organization to the terms of this contract.

The undersigned recognizes the right of the City of Santa Cruz to reject any or all proposals received and to waive any informality or minor defects in proposals received.

Consultant Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail address: _____

Signature of Authorized Representative: _____

Printed Name of Authorized Representative: _____

If Consultant is awarded the contract, will Consultant extend contract terms and pricing to other government agencies?

Yes No

3. Addenda

The City may determine it is necessary to revise any part of this solicitation. Revisions will be made by written addenda and it is the Consultant's responsibility to comply with any addenda to this solicitation. Any addenda will be:

- Emailed to known interested Consultants; Or
- Posted on the City's website, www.cityofsantacruz.com, under Bidding Information; Or
- Consultants may contact Tremain Hedden-Jones, Project Coordinator, at 831/420-6182, FAX 831/420-4257, or email tjones@cityofsantacruz.com.

SECTION 6: QUESTIONNAIRE

Answer all of the following questions. Any omission may be cause for rejection of proposal. Answers should be complete and in the order presented. A simple "yes" or "no" answer is not adequate.

Consultants have the right to take exception to the specifications or terms to this solicitation. Any exceptions taken must be explained in the proposal. Any exceptions that contradict the City's terms and conditions, or contain provisions that are not in the best interest of the City will disqualify the Consultant. If exceptions are not explained, the Consultant will comply with the specifications as stated in this solicitation.

Consultant's qualifications experience and references

- 1) Describe business background and qualifications, including year business were established.
- 2) Provide background of personnel that will be assigned to provide this service to the City.
- 3) Describe experience doing similar work for other public agencies.
- 4) Provide the location of office which will be performing work for City of Santa Cruz.
- 5) Provide the names of three clients for whom your business currently provides the same scope of services. Include the name of the business, the name of a contact person and the phone number.

Consultant's proposed work plan

- 6) Clearly define all work your business proposes to do for the City. Include a list of deliverables and a work schedule.
- 7) If you will subcontract portions of the work, list all subcontractors to be used. Include business name, address and phone number.
- 8) The City of Santa Cruz has long been an advocate for environmental conservation and sustainable living. This includes, but is not limited to, the Green Business Program, the Living Wage Ordinance, the Clean Ocean Business Program, and General Plan goals which define greenhouse gas reduction objectives.

Provide information about your company regarding environmental conservation practices or objectives, Green Business certifications, alternative fuel service vehicles, superior employee benefit policies, or other applicable policies.

Training, on-going support, and technical assistance

- 9) Describe training to be provided to City staff (during and after contract implementation).
- 10) Describe method of obtaining support after implementation. If it is a customer support call center, please include call center hours of operation.
- 11) What should the City expect regarding future technological advances?

SECTION 7: FEE SCHEDULE

- Detail all costs incidental to the **Surfing Museum Interior Renovation & Exhibit Development project**. Include all costs in your proposal. Consultant will not be allowed to charge for costs not listed in the proposal.
- Provide information regarding anticipated maintenance costs during the next 3 years.
- Describe under what circumstances that the City would be charged for additional work.

The following Early Pay Discount and Local Business and Locally Owned Business Preference will reduce the pricing evaluation criteria (as shown in RFP section 3.4) for bid evaluation purposes. The contract will be awarded for the full amount of the bid.

Early Pay Discount

The City will take any early pay discount offered as long as the discount period is fifteen days, or greater. This amount will be calculated at the percent offered and will be applied as a discount to the bid total.

A ____% discount is offered for payment within ____ days.

Local Business and Locally Owned Business Preference

Local Businesses and Locally Owned Businesses must submit Appendix A, Local Business Preference Certification, with the proposal in order to receive the 2% and *additional* 4% preference. Any preference will be applied on the pricing criteria only.

Appendix A



Local Business Preference Certification

Business Name: _____

Local Businesses and Locally Owned Businesses must submit this certification with each bid or proposal in order to receive the 2% and *additional* 4% preference applied during the evaluation of any competitive process for goods, supplies, equipment, materials, services, or professional services.

Local Businesses

To qualify for the 2% local business preference, a business must meet the following criteria:

- 1) Does the business have an office with at least one employee located in the City of Santa Cruz?
 Yes No Business Address: _____
- 2) Is the business current in the payment of all taxes, charges, assessments, or fees owed to the City of Santa Cruz?
 Yes No
- 3) Does the business hold a valid City of Santa Cruz business license?
 Yes No DBA/license number: _____

Locally Owned Businesses

To qualify for an *additional* 4% locally owned business preference, a business must meet the above requirements for a local business and at least 50% of the business' owners must live in the *County* of Santa Cruz.

To qualify for the locally owned business preference, list all of the business' owners and their county of residence (attach additional sheets if necessary).

Owner Name: _____ County: _____

Owner Name: _____ County: _____

Owner Name: _____ County: _____

Owner Name: _____ County: _____

By submitting this form, I represent that I qualify as a (check all that apply):

- Local Business
- Locally Owned Business

I understand that by submitting false information or failing to disclose material information in order to qualify for the preference my business will be 1) required to pay the city any difference between the contract amount and what the city's cost would have been if the contract had been properly awarded, and 2) prohibited from bidding on any city contract or receiving any city contract for a period of three years of the discovery of facts supporting the same.

Authorized Signature: _____

Name & Title: _____

Date: _____