



REQUEST FOR PROPOSALS (RFP)

**CONSULTING SERVICES TO DEVELOP THE
SANTA CRUZ CLIMATE AND ENERGY ACTION PLAN 2030**

**Date issued:
December 3, 2020**

**Due by:
January 18, 2021 at 12:00 p.m.**

For additional information or assistance, contact:

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1. GENERAL INFORMATION FOR VENDORS

1.1 Summary Scope of Work

The City Manager's Office of the City of Santa Cruz is soliciting proposals for consulting services to develop the city's Climate & Energy Action Plan 2030.

1.2 Background

The City of Santa Cruz's first Climate Action Plan was adopted in 2012 and set forth 12 milestones, 13 indicator metrics and 254 implementation actions to achieve its greenhouse gas emissions goals. The plan sunsets in 2020 and the City is in need of a new Climate Action Plan with a 2030 time horizon.

1.2 Contact

If you have any questions concerning this solicitation, please call contact Tiffany Wise-West, Sustainability and Climate Action Manager at 831-420-5433 or email twise-west@cityofsantacruz.com. To learn solicitation results, contact Tiffany Wise-West, Sustainability and Climate Action Manager at 831-420-5433 or email twise-west@cityofsantacruz.com after the due date. Please note, as a cost saving measure, City offices hours; please plan accordingly.

1.3 Proposal Deadline

Proposals are due no later than 12:00 PM January 18, 2021. All proposals will be delivered to the City Manager's Office, 809 Center Street Room 9/10, Santa Cruz, California, 95060 before the due date. **Late proposals may not be considered. Respondents take full responsibility for City's receipt of Proposal. City offices are closed between December 21, 2020 and January 1, 2021 for the holiday closure.**

Vendors 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 twise-west@cityofsantacruz.com. Submissions should include the RFP name and Consultant name clearly on the envelope and email title. The City prefers for proposals to be printed on recycled paper and recommends that proposals are a maximum of 25 pages. Email submissions will not be accepted if the corresponding unbound original is not submitted before the due date and time. If the file size is larger than 3 MB, please use a data sharing service such as Dropbox, Sharefile, etc.

1.4 Proposal Evaluation and Award

A contract for consulting services to develop the CAEP 2030 will be awarded based on the following criteria:

1. When determining **Responsiveness** of the vendor's proposal, the City may consider any of the following but not limited to:
 - a. Proposal is SEALED.
 - b. Proposal received on time and completed per instructions,
 - c. Proposal contains required contents, forms and signatures submitted in accordance with RFP instructions.
 - d. Exceptions with City's Terms and Conditions.
2. Proposal is compliant with specifications and industry standards,
3. Vendor is offering the lowest overall price for the best value (best value methodology detailed in section 3 of this solicitation),
4. When determining **Responsibility** of the vendor, the City may consider any of the following but not limited to:
 - a. Possession of industry standard licensing and/or certifications;
 - b. Financial capacity of the Vendor;
 - c. Experience or past performance of the Vendor;
 - d. Use of Subcontractors / Subconsultants
 - e. Past, present and pending legal actions
 - f. Project delivery schedule.

A vendor's failure to promptly respond to City's inquiries for proposal clarification may result in determination of non-responsiveness. The contract will be awarded on an all or nothing basis and is tentatively scheduled to begin February, 2021.

Vendors have the right to take exception to the specifications or terms to this solicitation, however, such exceptions may deem the proposal submission non-responsive during evaluation. Any exceptions taken must be explained in the proposal. Any exceptions that contradict the City's terms and conditions, or contain provisions that the City determines, in its sole discretion, are not in its best interest will disqualify the vendor. If exceptions are not raised in its proposal, the Vendor 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.

1.5 Organization of this RFP Document

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

Section 1- General Information to Vendors: 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 Vendor 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 Vendor response.

Section 7- Fee Schedule: Provides format for submitting pricing. Fee Schedules will include all costs incidental to performing consulting services to develop the Climate and Energy Action Plan 2030 according to this solicitation.

Appendix A- Local Business Preference Certification

SECTION 2: SPECIFICATIONS

2.1 Project Overview

The City of Santa Cruz seeks to develop a new Climate and Energy Action Plan 2030 (the Plan) with a vision that is transformative, engaging and capable of achieving carbon neutrality by 2045 or earlier in an equitable manner. The Plan and its vision will center around key community-driven principles. The Plan will be presented in a format that is accessible, visually appealing, easy to understand, and easily translated to a variety of media and for different audiences. The technical components of the Plan will be developed as technical memoranda that will serve as appendices to the main Plan. The Plan will be informed by a robust and multimodal community engagement process, designed to engage as many distinct constituencies as feasible. The Plan will require coordination with an external equity consultant, graphic designer, translators, the City's Communications Manager, the media and other stakeholders.

The Climate and Energy Action Plan 2030 will also utilize, align with, and conform to the following commitments:

- Relevant State Legislation and Executive Orders
- The City's Climate Suit against 29 fossil fuel companies
- Global Covenant of Mayors

- Paris Climate Agreement and [City's Resolution in Support of Paris Climate Agreement](#)
- The City's [Climate Emergency Resolution](#)
- The City's Health in All Policies [ordinance](#) and [city council policy](#)
- The City's [Green New Deal Resolution](#)
- The City's [Interim Recovery Plan](#)

The project includes three key consultant roles:

- Primary Technical Consultant (within the scope Tasks 0, 2 – 9 of this RFP)
- Community Engagement and Outreach Consultant (within the scope Task 1 of this RFP)
- Equity Consultant (outside of the scope of this RFP)

The CAEP 2030 Plan development project includes 10 primary tasks, with Task 0 consisting of Project Orientation and Management, and the remainder grouped into four Phases:

Mar 2021 - May 2021	Phase 1: Engagement, Reflection & Projections - Tasks 1 - 3 / City Council Update
June 2021 - Aug 2021	Phase 2: Goals & Strategies - Tasks 4 - 5 / Commission / CC Update
Sept 2021 - Oct 2021	Phase 3: Funding, Implementation & Special Topics - Task 6 - 7 / City Council Update
Nov 2021 - Jan 2022	Phase 4: Tools, CEQA & Plan Documents - Task 8 - 9 Commission / CC Update
Jan 2022 - Mar 2022	Adoption / Public Sustainability Dashboard and Public Activation Platform Launch

The budget for this work is \$220,000 inclusive of all travel costs, materials, printing and other costs associated with the project.

The project scope of work was conceived by City staff, the City's Community Climate Action Task Force, youth advisors, and the internal Sustainability Team. Proposals shall include details, identify connections across and between tasks and subtasks and identify whether City staff, Consultant(s) or another party is responsible for leading the task/subtask. In the spirit of creativity, entrepreneurship and extended learning, staff are open to amendments to the scope of work, within the limits of the budget to ensure the City adopts a plan that puts it on a rapid trajectory to carbon neutrality. Proposals may be submitted in two ways: a full proposal for Tasks 0 through 9 or a proposal to provide services for only Task 1.

Task 0: Project Orientation and Management

Task 0 will include refining and finalizing the scope of work and work plan together with City staff and stakeholders, identifying existing relevant background documents and data. The City will provide the Consultant with relevant data, host a project kickoff and orientation meeting and workshop; and introduce the Consultant team to key stakeholders, Sustainability Team staff, and the Community Climate Action Task Force.

The Consultant will be responsible for project planning, coordination with other consultants, technical advisors and advisory bodies, coordination and integration of staff and community engagement, technical analyses, strategy development, development of tracking tools, participation in public dashboard and activation platform development and the final compilation and graphic design of the Plan. The Consultant will present elements of the Plan to commissions and City Council at key project milestones. Ongoing project management will occur via bi-weekly or otherwise regular check-in calls with the project management team and monthly bulleted status reports (and invoices) provided by the Consultant Team to keep the City and its advisory bodies up to date on the Plan development process.

Deliverables:

Project Work Plan including final scope of work, deliverables and timeline with key milestones
Project organizational chart and contact list

*Agendas and meeting minutes for bi-weekly check-ins;
Agenda and meeting notes from project kickoff meeting and orientation workshop
Monthly bulleted progress reports as part of invoicing*

Task 1: Community Education, Engagement and Activation [*Community Engagement Consultant: Proposals for work described in this task may be made separate from the work described in the other tasks or together with the work described in all other tasks. Task 1 will be evaluated separately from all other tasks in full proposals.*]

The Community Engagement Consultant will support the City's staff and stakeholders in building the relationships and hosting the engagements needed to produce a Plan that will be as effective as possible, have optimum buy-in by all affected, and inspire and enable the greatest efforts to enact the Plan fully including community activation. The City's Climate Action Program has a well-developed base of trust in the community and sufficient resources to assist with generating materials, staffing events, and handling meeting logistics. All project deliverables will be translated into Spanish by an external translator.

Subtask 1.1: Develop and Implement a Community Education, Engagement and Activation Guide

Creative and effective community engagement and input are integral to the success of the climate action planning process. The Community Engagement Consultant will develop and lead execution of a Community Education, Engagement and Activation Guide, including a marketing strategy, relational network map and contact resource, in collaboration with the City and stakeholders. This guide will specify the timeline and milestones for community events, activities and processes. The Guide will include a promotional strategy, and evaluative indicators of success on engaging the community to support the Plan development. The Community Engagement Consultant may be enlisted to contribute to a framework for an ambassador pilot program that will amplify the reach of the project team in engaging community members. The ambassador program would be further planned, coordinated and carried out by the Climate Action Task Force members in collaboration with City staff and other anchor community groups. A general and tentative outline of anticipated engagement activities are specified in the subsequent tasks. However, the guide and its components will be flexible enough to adapt to creative ideas and changing conditions. It will be considered working in nature with the expectation that it may be revised to improve specificity, accessibility and inclusivity.

The guide and its implementation will consider the Santa Cruz Climate Action Task Force's *Engagement Principles*, a living document in development that will evolve as informed by community feedback. The Community Engagement Consultant will play the lead in designing activities and/or events, specifying promotional materials needed for promotion (with City Communications Manager and external graphic designer) and, with the Project Team, carrying out and facilitating the events, activities and processes specified in the guide including analyzing data collected and tracking/reporting success indicators for each engagement. It is anticipated the Community Engagement Consultant will also be familiar with virtual community engagement platforms (e.g., Ethelo, Metroquest, ESRI storymaps, etc.) to support each phase of the project. The Community Engagement Consultant will participate in the project kickoff workshop and equity screening exercise. Successful engagement with Latinx, youth and other historically under-served groups is a priority.

Deliverables:

- *Community Education, Engagement and Activation Guide and Tracking Summary*
- *Promotional materials (social media pieces, flyers, ads) to support Marketing Strategy*
- *Agendas, Meeting Activity Materials, Post-Engagement Summaries to support Community Engagements as specified in Tasks 2-10*

Subtask 1.2: Support Development of a Public Facing Tools

At the appropriate phase in the project, the Community Engagement Consultant will hold a key role in developing two public facing tools. The Community Engagement Consultant will facilitate a design consultation with the primary Consultant, Equity Consultant, City Project Team and Stakeholders to develop (1) a public facing, web-based and mobile-enabled sustainability dashboard through the City's Open Gov account and (2) an online community activation platform. The Community Engagement Consultant will contribute to visualization, ideation and content for each tool. The dashboard's content and graphics will simply and effectively communicate progress toward Plan targets and will be easily updatable by the Climate Action Manager and others responsible for collecting and compiling tracking data on a regular basis. The online community activation platform is intended to support sustained, community-wide activation to implement of Plan. The Community Engagement Consultant will assess the landscape of platforms and compare to custom options, recommending the best option. The platform will utilize elements like team competition, incentives, and gamification to keep residents interested and activated in accelerating collective climate action. The Community Engagement Consultant will advise on the design and promotional strategy of the activation platform.

Deliverables:

- *Community Activation Platform Comparison and Recommendations Memorandum*
- *Public Engagement Tools Design Consultation Agenda and Meeting Summary*
- *Draft and Revised Sustainability Dashboard and Community Activation Platform Mock-ups*

Task 2: Report on Climate Action Plan 2020, Benchmarking and Other Commitments

The Consultant will prepare a report on the Climate Action Plan 2020 (CAP 2020) Progress, complete a benchmarking of the City's Climate Action Plan milestones and targets with other cities, and participate in the first community engagement.

Subtask 2.1: Report on Climate Action Plan 2020

The Consultant will perform a GHG Emission Inventory Reconciliation (community and municipal), harmonizing previous inventories across US Community and Municipal Protocols. The Association of Monterey Bay Area Governments is in the process of completing the 2018 Community GHG Emissions Inventory and is responsible for completing 2019 and 2020 Community GHG Emissions Inventories in late 2021 and 2022, respectively. Consultant will support City staff to finalize the 2005, 2010 and 2015 Municipal GHG Emissions Inventories and an estimated 2020 Municipal and Community GHG Emissions Inventory for the purposes of CAP 2020 close out. The Consultant will present the findings across all emissions sectors and sources. ICLEI USA will perform an emissions Contribution Analysis to identify causes for emissions trends paying specific attention to the importance of private vehicles in these trends. The Consultant will integrate the ICLEI USA Contribution Analysis into the deliverable. The historic GHG trends analysis shall be reported gross and per capita, by household, by sector and by geographic area, etc., as feasible.

The Consultant will review City data and documentation and present final progress on the 12 Climate Action Plan 2020 milestones and their 13-indicator metrics as well as the 254 Climate Action Measure Implementation actions progress. Consultant will assess and discuss the City's progress toward other commitments (e.g., Global Covenant of Mayors, etc.).

Finally, the Consultant will prepare and discuss an evaluation of the City transitioning to a Lifecycle or Consumption Based Emissions Inventory Method, including pros, cons, costs and resources. Consultant will participate with community engagement consultant and city staff in presenting this information to the

community. The community engagement will also include visioning of the community's carbon neutral future.

Subtask 2.2: Benchmarking Santa Cruz with other Cities

The Consultant will also review the City's existing policies, programs and best practices and use the Carbon Disclosure Project's city reporting database and other comparative tools to benchmark the City's progress on its Climate Action Plan 2020 as compared to other cities of its size and other attributes.

Subtask 2.3: Community Education, Engagement, and Visioning

Working closely with the Community Engagement Consultant and stakeholders, assist in planning and participate in the first community engagement touchpoint to report progress on the Climate Action Plan 2020, conduct climate future visioning and identify a name for this vision and Plan. From data collected in this engagement, the Consultant and Community Engagement Consultant shall identify key cross cutting themes, preferences for future educational topics and opportunities, and future plan engagement preferences for next phase. Engagement must be accessible and ensure wide and diverse community participation. The Consultant will integrate data collected and summaries provided by the Community Engagement Consultant into future work tasks.

Deliverables:

- *Technical Memo 1: Final Progress Report on Climate Action Plan 2020 including benchmarking*
- *SEEC ClearPath finalized GHG inventories*
- *Community Engagement 1 Materials*

Task 3: GHG Emissions Forecasting

ICLEI USA will provide two support functions on this deliverable that the Consultant will integrate into the analysis and the Memo Narrative: (1) ICLEI will create a set of Business as Usual (BAU) GHG emissions forecasts in California's SEEC ClearPath for community and municipal government operations emissions through 2045 for the Consultant to build upon; and (2) training support for staff and/or community on this Task. The BAU forecast will be based on land use projections for the City and consistent with policies measures and actions taken at the State and Federal level.

The wedge analysis should include different emissions sources (wedges) such as stationary energy consumption, grid energy, transportation, land use, water, wastewater, solid waste, and urban natural resources organized into scopes as defined by protocol. The Consultant will also complete wedge analysis using SEEC's ClearPath for up to 4 potential scenarios forecasts including:

1. TBD
2. Carbon Neutrality by 2045 (CA Executive Order B-55-18)
3. Carbon Neutrality by 2030
4. Paris Agreement Compliance

The Consultant shall work with the Community Engagement Specialist to prepare virtual community engagements to support this Task including a report on Draft Forecasting and other Emissions Scenarios, coordinate a subject matter expert on Carbon Neutrality Concept and conduct an Activity on Goal Setting.

The Consultant will prepare a technical memo that includes community input on recommended emission reduction targets, business-as-usual GHG emission forecasts, and emissions reduction required to achieve various reduction targets, including achieving carbon neutrality by 2045 or sooner. The Consultant will also prepare for and participate in an update to City Council.

Deliverables:

- *Tech Memo 2: Draft and Final GHG Emissions Forecasting*
- *ClearPath BAU and 4 other Emissions Scenarios*
- *Virtual Community Engagement 2 materials*
- *City Council slide deck and meeting summaries*

Task 4: Goal Setting and Carbon Neutrality

In this task, the Consultant will lead the City and its stakeholders through goal setting and carbon neutrality year identification activities. Goal setting will include development of emissions targets for new development, sectoral specific goals and targets, and identifying the earliest feasible year for carbon neutrality.

Subtask 4.1 Lead the City and Stakeholders through Goal Setting

Consistent with statewide goals set by California's Senate Bill 32, the City's CAP 2020 GHG emissions targets mandate community-wide GHG emissions reduction of 40% below 1990 levels by 2030. The City met this target in 2018 due to carbon free electricity procurement from Central Coast Community Energy (3CE), which put Santa Cruz on track to achieving its 2050 target of reducing communitywide GHG emissions to 80% below 1990 levels. However, the 3CE procurement strategy has recently changed and must be considered in this climate action planning process.

The Consultant will evaluate the California Air Resources Board's assessment of the statewide target and support a local determination of substantial evidence in support of local targets consistent with the statewide target. Since most of local emissions come from private vehicles, the Plan needs to strongly focus on transportation. The Consultant will analyze how to achieve these goals, as described in Task 5, and assess the Air Resources Board recommendation that local governments adopt a community-wide goal of reducing GHG emissions to 6 MTCO_{2e} per capita by 2030 and 2 MTCO_{2e} per Capita by 2050. Consultant will also analyze methods for setting a mass emissions reduction target for the City's population on a per capita metric. Consultant will work with City staff to make the appropriate recommendation.

California Executive Order B-55-18 calls for carbon neutrality by 2045 as a statewide target, and is likely to move forward as a recommendation in upcoming State guidance. The Consultant will evaluate targets in the context of SB32 and Paris Agreement compliance, as well as the earliest year for carbon neutrality.

As state GHG reduction targets become more aggressive, a plan that exceeds current State guidance has the benefit of extending the useful life of the plan, including for CEQA compliance purposes. After review and reconciliation of the City's existing emissions inventory, the Consultant will outline by community-wide and municipal only reduction target options for discussion with the City and community and, including a review of recent CEQA guidance from the State, select case law for the City Attorney to consider, and select adopted climate action plans.

Subtask 4.2 Conduct Community Engagement 3:

Consultant shall work with the Community Engagement Consultant to prepare an engagement that includes a report out on Draft Goals and Targets, conduct a community wide Emissions Reduction Strategy Brainstorming Session and Criteria Development / Prioritization Activity and identify City and other subject matter experts to participate in a knowledge sharing exercise on topics identified by the community as high priority.

Upon completion of this step, Consultant will prepare technical memo describing methodology, community input and recommendations for goals and carbon neutrality year, and considerations for CEQA compliance.

Deliverables:

- *Technical Memo 3: Draft and Final Goal Setting and Carbon Neutrality Target*
- *Community Engagement 3 materials*

Task 5: Strategy Selection and Carbon Neutrality Pathway***Subtask 5.1 Draft Strategies and Considerations***

Drawing from Community Engagement 3, the Consultant will work with various City departments, the Community Engagement Consultant, the Equity Consultant, and the community to develop a draft matrix of sector-based emissions mitigation strategies for community and municipal operations to meet the goals and targets set forth in Task 4. These strategies may include but are not limited to:

- Transportation; including usage of low and zero-carbon mobility, private automobiles and fleets, transit, shared mobility, freight and heavy-duty vehicles, commuter and traffic patterns
- Current land use and zoning relevant to the development of renewable energy and energy storage, including public infrastructure; development along transportation corridors; carbon sequestration in city parks and urban forests
- Building and other energy use; including opportunities for fuel switching/electrification, ultra-efficient building design such as Passive House, to accelerate EV adoption, deep energy efficiency, energy storage retrofits, renewable energy, usage patterns, building resiliency for adaptation to increased climate variability, time of use programs, and relevant local/state building code/permitting best practices
- Waste Reduction and material consumption; describing and quantifying both upstream and downstream waste streams, and current behavioral initiatives and incentives.
- Carbon sequestration; including quantifying and amplifying local sequestration through urban forestry, low impact development requirements in, for example, neighborhoods and parks such as Pogonip and DeLaveaga, and etc.
- Behavior characteristics and opportunities across all categories particularly in transportation and water conservation, and supportive diet and food systems

Strategies shall build off existing planning efforts and have clear key performance indicator (KPI) metrics to meet the City's GHG reduction goals for each sector to reach the overall carbon neutrality target. Mitigation actions will include assessing and delineating opportunities within and outside local governmental control and be characterized by GHG reduction potential, cost per metric tonne of carbon dioxide equivalent avoided or reduced, return on investment, implementation feasibility, required staff capacity, optimal organizational structure, term implementation timeframe, co-benefits, benefits and costs for low-income or frontline communities, responsible parties for implementation, and community support, among other recommended attributes. The costs for not implementing measures will also be calculated based on the BAU scenario.

Building on Community Engagement 3, the Consultant will work with City staff and community engagement consultant to develop a draft process and criteria for strategy selection. The Equity Specialist will provide input on the equity of each strategy as an explicit criterion to consider for selection.

Deliverable: Draft Strategy matrix and evaluation criteria

Subtask 5.2: Develop and Use a Climate and Energy Scenario Analysis Tool

Consultant will develop and/or utilize a Climate and Energy Scenario Analysis tool (e.g., online platform, excel, other) to identify the most cost efficient and feasible set of strategies for reaching the carbon neutrality target and other goals under different investments and assumptions. The Consultant will work

with the City departments to identify possible investment pathways, decision making metrics and appropriate assumptions. The tool is intended for use by City staff but may also be leveraged for use in engagement as well as Subtask 1.2 (Public Facing Tools) and Task 9 (Tracking). While technical in nature, the tool shall be user friendly. It should be populated with BAU and other emissions scenarios to support strategy selection, generate wedge graphs and other graphics depicting various metrics including net present value of various strategy sets, and be provided to the City for ongoing scenario assessment and include an accompanying User Guide.

Deliverable: Scenario Analysis tool and User Guide

Subtask 5.3: Conduct a Green Economy & Jobs Analysis

In conjunction with the carbon neutrality strategy development, the Consultant will assess the local and regional economic outlook and perform a Green Economy and Jobs Analysis focused on the most cost-efficient set of strategies identified for reaching the carbon neutrality target and other goals. The Consultant will explicitly identify sectors and professions that might be developed and grown through policy mechanisms and partnerships and collaboration with higher education and vocational schools, the Economic Development Department, Monterey Bay Economic Partnership and California Stewardship Network,

The analysis should include development of green jobs through coastal and watershed resiliency and restoration projects, other workforce training initiatives, local climate incubators, training a pipeline of skilled workers to advance to City positions such as water distribution operators, wastewater treatment plant operators and rangers, and business resiliency programs. The analysis will ascertain appropriate mechanisms to fund such programs. A primary aim will be to provide opportunities to historically under-represented, under-served and under-resourced members of the community.

Subtask 5.4 Conduct Community Engagement 4: The Consultant will work with the Community Engagement Consultant to present the draft strategies, potential carbon neutrality pathway(s) and green economy analysis findings at a community workshop. Activities should be designed to determine community priorities for the criteria. The Consultants will also engage with City leadership, working groups and departments in the selection process. The Consultant will work with the Community Engagement Consultant to analyze staff and community feedback collected and recommend strategies, policies and projects to include in the Plan. In addition, the Consultant will also provide content and materials for a community knowledge sharing activity on Climate Action Funding and the Green Economy. The Consultant will also engage internal stakeholders in an exercise for the Plan's Short Term/Long Term Implementation. The Consultant will also prepare for and participate in a City Council study session and presentations to the Planning, Parks and Recreation and Transportation and Public Works Commissions in this subtask.

Deliverables:

- *Community Engagement 4 Materials*
- *Commission Meetings and City Council Study Session slide decks and Summaries*

Task 5.5 Prepare Technical Memo 4: Strategy Selection & Carbon Neutrality Pathway

Referencing work performed in Tasks 5.1 – 5.4, the Consultant will prepare sets of strategies to establish the preferred and recommended pathway for community and municipal carbon neutrality. Pathways to community and municipal carbon neutrality will be finalized as informed by internal stakeholder and community input in the draft Plan review during Task 10. The Consultant will include KPIs, or metrics, and milestones for each selected climate mitigation project in order to track progress over time and summarize the green economy analysis and recommendations. The Consultant will also discuss

consistency with Section 15183.5b of the CEQA Guidelines (a “Qualified Plan”) to streamline future CEQA analysis, where this effort will include establishing a level below which the contribution to GHG emissions from activities covered by the plan would not be cumulatively considerable. For example, future projects may be required to demonstrate consistency with a per capita threshold developed for new growth projects, as well as consistency with applicable emissions reduction measures.

Deliverable: Technical Memo 4: Strategy Selection and Carbon Neutrality Pathway

Task 6: Develop Short- and Long-Term Funding & Implementation Plan

The Consultant will assess City policy and budgeting, opportunities for savings, near term funding opportunities, financial and social incentives, revenue generation potential including carbon pricing markets, social and environmental impact bonding, ecosystem service payment schemes, and other opportunities for the organization’s structural and process change. Consultant will work with City staff to identify and map strengths and weaknesses with respect to implementation as well as structural and policy barriers to implementing the Plan and achieving its goals. The Consultant will then develop (1) a three-year community and municipal implementation plan with roles for key City leadership and staff, the Sustainability Team, the Climate Action Task Force, residents and the business community and that includes GHG reductions and staff resources over time, (2) a funding plan for near-term (through 2025) and (3) longer-term, higher level community and municipal implementation of the Plan through the carbon neutrality target year.

Consultant will work with staff to identify necessary structural and process changes, as well as policies to facilitate internalization of the Plan across departments and other planning documents. Complementary to this step will be the development of a Draft checklist provided to the City to support development applicants and City staff awareness of any Plan requirements for their proposed project prior to submittal. Consultant will provide staff training as needed, explaining how the Plan will affect staff and how staff can implement the Plan.

The Consultant will participate in Community Engagement 5, working with the Community Engagement Consultant, Sustainability Team, and Climate Action Task Force to prepare a public report on the Short-Term and Long-Term Funding & Implementation and conduct Activity on Engagement Preferences for Tasks 8 and 9.

Deliverables:

- *Community Engagement 5: Internal and External Stakeholder Engagement Activity Materials/Summaries*
- *Technical Memo 5: Short- and Long-Term Funding and Implementation Plan*
- *Draft checklist to support staff and development applicant awareness of Plan requirements*

Task 7: Develop and Analyze Plan’s Nexus with Related Topics

The Consultant will analyze the Plan’s nexus with several special topics: climate adaptation work, biodiversity, climate regeneration, public health and Covid-19 recovery. Analysis should include a high-level review of how BAU global emissions will impact these issues. The Consultant will work with the Community Engagement Consultant and ICLEI to deliver community knowledge sharing activities and feedback sessions and presenting the analysis in a technical memorandum. To support this task, ICLEI USA and/or CitiesWithNature will deliver a knowledge sharing activity on integrating biodiversity- and nature-based solutions into the Plan. The Consultant will also prepare for and participate in a report to City Council at the conclusion of this task.

Deliverables:

- *Technical Memo 6: Analysis of Plan’s Nexus with Related Topics*
- *Community Engagement 6: Knowledge Sharing Activities/Feedback Sessions /Summaries*
- *City Council meeting slide decks*

Task 8: Develop Tools for Monitoring, Tracking and Activation

The Consultant will review the City's Health in All Policies (HiAP) community well-being indicators (see the HiAP Implementation Plan and its appendix on the Santa Cruz County CORE conditions and United Way's Community Assessment Project indicator metrics) to understand where with the HiAP indicator metrics support and complement the Plan's sustainability strategies and equity aims of the Plan. The Climate and Energy Scenario Analysis tool or some other tool will be developed by the Consultant to track relevant HiAP indicators in addition to the Plan's primary goals, targets and KPIs. The Consultant will prepare a tracking guidance document that explicitly detail data sources, availability, timing and frequency of obtaining data, standard graphics to demonstrate the value proposition of implementation progress and investment, and create an annual reporting template report and slide deck.

Consultant will provide limited assistance with integrating outputs from the tracking tool into a public facing Sustainability Dashboard through the City's Open Gov platform as well as a to-be-determined community activation platform to facilitate ongoing transparency with and inspire activation of the community in implementing the Plan. The City will be responsible for integrating work between Consultant, Open Gov and other vendors, and Community Engagement Consultant on developing the Sustainability Dashboard and the community activation platform.

Deliverables:

- *Tracking tool*
- *Annual reporting templates and tracking guidance document*

Task 9: Develop Draft Plan, Final Plan, and Environmental Document

The draft Plan will be succinct, well written, graphically appealing and fully accessible to an interested lay reader. It will include infographics and be organized by major themes identified through prior technical work and community engagement.

The Plan will concisely and simply communicate key findings from each of the technical studies, focusing primarily on the major themes, goals and actions developed, and linking community feedback loops to those Plan outcomes. Consultant is responsible for design of the Plan. A set of technical memos produced throughout the project will serve as Appendices to the Plan, documenting analysis, community input and recommendations. City staff will first review an Administrative Draft of the Plan and work with Consultants to develop the Public Review Draft Plan.

There will be an opportunity for community feedback on the draft Plan. The Consultant will contribute to the final engagement's planning and integrate feedback into the Final Plan in collaboration with the Community Engagement Consultant and Equity Consultant's input. The Consultant will work with the Community Engagement Consultant to conduct Community Engagement 7 to present the Draft Plan for community input and, after preparation of the Final Plan, will participate in of adoption of the Plan. The Consultant will prepare for and participate in an update to the City Council, Planning Commission, Parks and Recreation Commission and the Transportation and Public Works Commission as well as participate in a single Plan adoption celebration.

Subtask 9.1: Prepare Appropriate Environmental Documents

Concurrent to Plan development, the Consultant shall prepare appropriate environmental documents for the updated Climate and Energy Action Plan under CEQA. The Consultant will be responsible for developing an addendum to the Environmental Impact Report prepared for the current 2030 General Plan, assisting the circulation of the draft report for public review, and finalizing the report per public comments and City staff feedback.

Deliverables:

Administrative Draft Climate and Energy Action Plan 2030

Community Engagement 7 materials

*Draft and Final Environmental Document
Public Review Draft and Final Climate and Energy Action Plan 2030
Commission and City Council meeting slide decks/summaries*

2.2 Responsibilities of Vendor

Enlisting all stakeholders, the interdisciplinary Consultant(s) will lead the development of a second generation Climate and Energy Action Plan 2030 (the Plan) with a sunset time horizon of 2030 that is California Environmental Quality Act (CEQA) qualified. The Consultant(s) will:

- Report on the City's implementation progress and status on the Climate Action Plan 2020 goals and milestones and prior climate commitments;
- Establish greenhouse gas (GHG) emission targets for the City and identify the year of carbon neutrality at or earlier than 2045;
- Apply equity screening tools to the climate action planning process and resulting implementation and engagement strategies to ensure equitable outcomes;
- Prepare and participate in a robust community engagement campaign utilizing state-of-the-art tools;
- Establish the most cost effective and equitable pathways to city-wide and municipal GHG emissions targets and carbon neutrality through a set of climate action strategies, implementation plans, and metrics for reducing, measuring and reporting progress.
- Develop mechanisms to activate and engage residents, businesses and institutions in both the planning process and its implementation in coming years
- Identify synergistic co-benefits and linkages to next generation climate action work, such as the nexus with biodiversity, climate adaptation, a green economy, and Covid-19 recovery and regeneration.

2.2 Responsibilities of City

The City will be responsible for providing the following resources, datasets, studies and reports to the Consultant(s) for their use in the project's development:

Resources:

1. Project Manager - Sustainability and Climate Action Manager
2. Project Coordinator - CivicSpark Sustainability Fellow
3. Communications Support - Communications Manager
4. Advisory Committee - Community Climate Action Task Force and youth advisors
5. Advisory Committee - Internal Sustainability Team
6. Ad hoc working groups - as needed with community and city staff
7. ICLEI (an international organization for local government climate action) can serve as trainer or resource for the selected Consultant(s) (approximately 3 hours per month) and will support project as specified
8. Equity Consultant to lead the equity screening, participate in scope refinement and engagement plan development, screening and provide ongoing advisement and/or facilitation support throughout the project.

Data Sets

- 2000, 2008 Community GHG Emissions Inventories - Master Spreadsheets/Reports
- 2005, 2010, and 2015 Community GHG Emissions Inventories (ICLEI US Community Protocol and 2015 in Global Protocol format also) - Master Spreadsheets and California's SEEC ClearPath records
- 2005, 2010, and 2015 Partially Complete Municipal GHG Emissions Inventories (ICLEI Municipal Protocol format) - Master Spreadsheets
- 2016 - 2020 Employee Commute Data - Spreadsheets
- Climate Action Plan 2020 Milestone Progress spreadsheet, Climate Action Measure Implementation progress spreadsheet and Annual Progress Report slide decks

- Carbon Disclosure Project reporting (2017-2020)
- Beacon Award documentation: Santa Cruz’s Platinum Award historical best practices documentation
- PG&E natural gas and electricity consumption data
- Energy Dashboard and Consumption/Production Data (Electricity, Natural Gas and Solar PV production, some building and electric vehicle charging submetering)
- Urban Tree Inventory GIS based Database (2020)
- Residential and Municipal Waste Characterization Datasets (2019)
- City Environmental and Climate Policy Database (excel)

Studies and Plans

- Climate Action Plan 2020 (adopted in 2012)
- Energy utility rate analyses (2020)
- Municipal Solar PV Opportunity Analysis (2017)
- Preliminary City-wide GIS Microgrid Opportunity Analysis (2020)
- Public Electric Vehicle Charging Needs and Use Study (draft 2017) and Electric Vehicle submetering data (for some EVC)
- Urban Tree Canopy Study (2018)
- Urban Tree Inventory Report (2020)
- Streets Tree Plan (2020 in progress)
- Parks Master Plan (2020)
- Waste Characterization Study (2019)
- Active Transportation Plan (2017)
- Water Conservation Plan (2017)
- Stormwater Management Plan (2009)
- Stormwater Management Plan Guidance Document (2013)
- Climate Adaptation Plan and Local Hazard Mitigation Plan (adopted in 2018)
- West Cliff Drive Adaptation and Management Plan (in progress)
- Health in All Policies Implementation Work Plan, ordinance and city council policy (2020)
- Central Coast Community Energy Electrification Plan (2019) and Procurement Strategy (2020)

CEQA Determination

The City has not predetermined the outcome of the environmental analysis and will exercise its independent judgment when making any final determination as to the appropriate level of environmental review. For the purposes of submitting a proposal, respondents should assume that the project will entail a “qualified climate action plan” and preparation of an addendum to the current 2030 General Plan Environmental Impact Report. City staff will assume responsibility for CEQA review and documentation.

2.3 Basic Qualification of Vendor

The Consultant(s) must have subject matter expertise and fluency in sustainability topics and best practice, methodologies, analysis, and developing strategies; expert facilitation and communications skills; CEQA, and demonstrated experience in executing a theory of change appropriate to the goals of this project.

SECTION 3: PROCESS INSTRUCTIONS

3.1 RFP Schedule

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

Action	DATE
1. Issue RFP	December 3, 2020

4. Deadline for submitting additional questions	December 16, 2020
5. City response to additional questions	December 18, 2020
6. Proposal due date	January 18, 2021
7. Oral presentations for finalists	January 25-26, 2021
8. Proposal evaluation completed	January 28, 2021
9. Notice of intent to award	February 1, 2021

3.2 Proposal Format

Proposals are due no later than 12:00 PM January 18, 2021. All proposals will be delivered to the City Manager’s Office, 809 Center Street Room 9/10, Santa Cruz, California, 95060 before the due date. **Late proposals may not be considered. Respondents take full responsibility for City’s receipt of Proposal. City offices are closed between December 21, 2020 and January 1, 2021 for the holiday closure.**

Vendors 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 twise-west@cityofsantacruz.com. Submissions should include the RFP name and Consultant name clearly on the envelope and email title. The City prefers for proposals to be printed on recycled paper and recommends that proposals are a maximum of 25 pages. Email submissions will not be accepted if the corresponding unbound original is not submitted before the due date and time. If the file size is larger than 3 MB, please use a data sharing service such as Dropbox, Sharefile, etc.

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

Proposals should be organized as follows:

- RFP Cover Page, Section 5:** Provides basic Vendor contact information and an authorized signature accepting the City’s terms and conditions as stated in this solicitation.
- Vendor Response to RFP Questionnaire, Section 6:** Answers should be complete and in the order presented. Make your proposal as short as possible and do not include generic marketing materials.
- Fee Schedule, Section 7:** Provide complete pricing for all items listed. Include all possible costs. Vendor will not be allowed to charge for costs not included in the proposal.
- Optional Appendices or Exhibits:** Vendors may include sample reports, peer review reports, letters of recommendation, or other exhibits that may assist the City in favorably evaluating the Vendor. Do not include generic marketing materials.

Vendors 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 vendor. If exceptions are not explained, the Vendor 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 Vendor’s responsibility to comply with any addenda to this solicitation. Any addenda will be:

- Emailed to known interested vendors, or
- Posted on the City’s website, www.cityofsantacruz.com, under Bidding Information, or
- Vendors may contact Tiffany Wise-West, Sustainability and Climate Action Manager at 831-420-5433 or email twise-west@cityofsantacruz.com.

3.4 Proposal Evaluation

RFP responses may be made as a proposal that includes all tasks (0-9) or only task 1 (Community Education, Engagement and Activation). All RFP responses will be evaluated and ranked according to the criteria below by an evaluation committee composed of City staff and stakeholders. The evaluation committee will open and review the proposals in confidence. Proposals will be available to the public after contract award.

Does the proposal meet the minimum requirements to be responsive (supplied all documentation required): **Pass/Fail**

Does the proposal meet the minimum qualification requirements in Section 1.8 to be responsible (the documentation provided shows that the offeror is capable of performing the work): **Pass/Fail**

If Passed both continue scoring based on the template below.

<u>Criteria</u>	<u>Weight</u>
1. Firm qualifications, experience and references	25 Points
2. Project understanding and proposed work plan	25 Points
3. Innovative, flexible and progressive approach	15 Points
4. Project team qualifications and demonstrated ability to work with diverse stakeholders	20 Points
5. Overall quality of proposal	10 Points
6. Proposed cost and value	5 Points
Total: 100 Points Possible	

3.4.1 Proposal Evaluation Criteria Definitions

a. Firm qualifications, experience and references (25 pts)

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

b. Project understanding and proposed work plan (25 pts)

Proposals will be evaluated for the Vendor’s demonstrated understanding of the project and proposed work plan.

c. Innovative, flexible and progressive approach (15 pts)

Proposals will be evaluated for the Vendor’s ability to demonstrate an approach that is creative, innovative, flexible and progressive.

d. Project team qualifications and demonstrated ability to work with diverse stakeholders (20 pts)

Proposals will be evaluated for the vendor’s proposed team qualifications including demonstrated ability to work with diverse stakeholders and other consultants and vendors.

e. Overall Quality of Proposal (10 pts)

Proposals will be evaluated for its professionalism, presentation and thoroughness. Vendors should answer all questions in the order presented.

f. Proposed cost and value (5 pts) The total cost of the contract will be 5% of the overall evaluation. The lowest responsive offeror will be given the full points for this criteria and higher offers will be scored proportionally. Proposed fees will be presented as not-to-exceed costs for the contract term and will include all professional fees and expenses.

3.5 Optional Evaluation of Semi-Finalists

After the initial proposal evaluation, the City may determine that additional information is needed to establish the final ranking of vendors. The semi-finalists will be contacted and may be asked to:

- Make an oral presentation by responding to pre-established questions,
- Provide additional information to assist City in determining the best value vendor.

All semi-finalists will be given equal opportunity to provide the requested information to the City. Any oral presentations and/or demonstrations will be scheduled for a mutually agreed upon date, tentatively to be scheduled between January 25 and 26, 2021, and will be at no cost to the City.

The Evaluation Committee will use all information collected to rank the semi-finalists in order of their ability to best meet the requirements of the City. The City will begin negotiating a firm contract with the highest ranked Vendor. If no agreement can be reached, negotiations will begin with the next ranked Vendor.

3.6 Contract Implementation

The contract resulting from this solicitation is tentatively scheduled to begin by March 1, 2021. 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 Vendor 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 Vendor's response to Section 6 (RFP Cover Page), the Vendor'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.

3.7 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.

3.8 Award Protests

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

The City encourages Vendors 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 vendor 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:

Tiffany Wise-West
phone: 831 – 420 – 5433
or email: twise-west@cityofsantacruz.com

Any Vendor who 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. Protest letters regarding a formal contract award will be directed to:

City of Santa Cruz
City Clerk Administrator
809 Center Street, Room 9
Santa Cruz, California 95060

Protests will be filed with the City Clerk's office no later than 5 business days after the written notice of intention to award has been distributed. Protest letters will include:

- The name, address, and telephone number of the protester;
- The solicitation title and due date;
- Name of City employee and Department designated as the contact in the original solicitation;
- A detailed statement of the legal and/or factual grounds for the protest; and
- The form of relief requested.

The City Council will hear the protest prior to award of the contract. The protesting party may protest the City's or successful Vendor's failure to comply with the requirements of the Purchasing Ordinance or the solicitation documents. The protest must clearly set forth the basis for the protest; grounds not set forth in the written protest will not be considered by the City Council at the protest hearing. The City Council will sustain a protest if it determines, in its sole discretion, that the protesting party has demonstrated by clear and convincing evidence that, as specified above, the City would act improperly in awarding the contract. The decision of the City Council 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 [here](#); 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

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

4.1.2 Prevailing Wage [See the [Prevailing Wage Requirements](#) on the intranet]

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 Term of Contract

The term of the contract will commence upon notification of award and continue for a period of 16 months [longer terms are acceptable but not always in the City's best interests], plus any renewals agreed to by the parties.

4.3 Vendor Travel Reimbursement Policy

When it is mutually agreed between the City and the vendor, the vendor's employees will be reimbursed for travel expenses according to this policy. It is expected that all travel expenses incurred by vendors while conducting activities on behalf of the City will be at reasonable rates and that vendors will exercise prudence in incurring these expenses.

Meals

Meals are reimbursed at the current GSA Meals & Incidental per diem rate by county (www.gsa.gov/travel). The City does not reimburse for actual costs for meals. Reimbursement is based solely on per diem rates. Do not submit meal receipts.

- Travel before 8:00a qualifies for breakfast reimbursement.
- Travel between 8:00a – 1:30p qualifies for lunch reimbursement.
- Travel between 1:30p – 7:00p (or later) qualifies for dinner reimbursement.
- Days between hotel stays and days starting before 8a and ending after 7p, qualify for the full GSA Meals & Incidental per diem rate.

Ground Transportation

Ground transportation is reimbursable when it is for travel between the vendor's place of business, their employee's home, an airport, or Santa Cruz hotel to their City work location.

1. Reasonable fees for taxis, shuttles, busses, trains, light rail, ride hailing services (Uber, Lyft), bike shares (Jump), and similar modes of transportation will be reimbursed. Receipts are required for reimbursement.
2. Personal vehicles include vehicles owned by the vendor or their employees.
 - Mileage will be reimbursed at the current IRS mileage rate.
 - Evidence of automobile liability insurance meeting the City's requirements must be provided.
 - Maps showing starting point, City work location, and total miles are required for reimbursement.
3. Car rentals are reimbursable when
 - Travel is necessary from an airport to the City work location.
 - The rental reservation is made as far in advance as is practical and the lowest possible price is obtained.
 - Insurance coverage is included in the rental agreement and the car is returned with a full tank of gas.
 - The smallest vehicle necessary is rented.
 - Parking expenses are included in the GSA Meals & Incidental per diem rate. The City will not pay additionally for parking expenses.
 - Receipts are required for reimbursement.

Airfare

Airfare is reimbursable when the vendor's place of business, or their employee's home, is more than 250 miles away from Santa Cruz.

- Airfare must be lowest available coach class fare. Flights may be non-stop.
- Airfare must be booked as far in advance as is practical.
- Fees for one piece of checked luggage (and any equipment necessary for the work being done) will be reimbursed.
- Extra charges for seat assignments, refundable tickets, travel insurance/protection, and similar fees are not reimbursable.
- If the City cancels the need for travel and the ticket cannot be changed or refunded, the ticket cost will be reimbursable.

- Receipts are required for reimbursement.

Lodging

Lodging is reimbursable when the vendor must work on site for two or more consecutive days and the vendor's place of business, or their employee's home, is more than 60 miles away from Santa Cruz.

- Lodging is reimbursed up to the current GSA rate by county (www.gsa.gov/travel).
- Costs for hotel rooms above this rate are the responsibility of the traveler.
- Receipts are required for reimbursement.

General

- Travel expenses not listed above will not be reimbursed.
- Travel reimbursements are paid after the completion of travel. There are no travel advances.
- Exceptions to any of the above requirements require advance written permission from the Department Head of the department contracting with the vendor.

4.4 Equal Employment Opportunity/Non-Discrimination

City's policies promote a working environment free from abusive conduct, discrimination, harassment, and retaliation; and require equal opportunity in employment for all regardless of race, religious creed (including religious dress and grooming practices), color, national origin (including language use restrictions), ancestry, religion, disability (mental and physical), medical condition, sex, gender (including gender identity and gender expression), physical characteristics, marital status, age, sexual orientation, genetic information (including family health history and genetic test results), organizational affiliation, and military or and veteran status, or any other consideration made unlawful by local, State or Federal law. City requires Consultant to be in compliance with all applicable Federal and State and local equal employment opportunity acts, laws, and regulations and Consultant is responsible for ensuring that effective policies and procedures concerning the prevention of abusive conduct, discrimination, harassment, and retaliation exist in Consultant's business organization. The City's current Equal Employment Opportunity and Non-Discrimination policies to which this Section applies may be viewed at <http://www.codepublishing.com/CA/SantaCruz/?SantaCruz09/SantaCruz0983.html> and <http://www.cityofsantacruz.com/home/showdocument?id=59192>.

Copies are available upon request from the City's Purchasing Division.

4.5 Indemnification

For General Services: To the fullest extent permitted by law, Consultant agrees to indemnify, defend, and hold harmless the City, its officials, officers, employees, and volunteers from and against any and all claims, demands, actions, liabilities, damages, judgments, or expenses (including attorneys' fees and costs) arising from the acts or omissions of Consultant's employees or agents in any way related to the obligations or in the performance of services under this Agreement, except for design professional services as defined in Civil Code § 2782.8, and except where caused by the sole or active negligence, or willful misconduct of City.

For Design Professional Services under Civil Code §2782.8: To the fullest extent permitted by law, Consultant agrees to indemnify, defend, and hold harmless City, its officials, officers, employees, and volunteers from and against any and all claims, demands, actions, liabilities, damages, or expenses (including attorneys' fees and costs) arising from the negligence, recklessness, or willful misconduct of the Consultant, Consultant's employees, or agents in any way related to the obligations or in the performance of design professional services under this Agreement as defined in Civil Code §2782.8, except where caused by the sole or active negligence, or willful misconduct of City. The costs to defend charged to the Consultant relating to design professional services shall not exceed the Consultant's proportionate percentage of fault per Civil Code §2782.8.

SECTION 5: PROPOSAL COVER PAGE

1. Proposal Deadline

Proposals are due no later than 12:00 PM January 18, 2021. All proposals will be delivered to the City Manager’s Office, 809 Center Street Room 9/10, Santa Cruz, California, 95060 before the due date. **Late proposals may not be considered.**

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 Consulting Services to Develop the Climate and Energy Action Plan 2030” dated December, 2020, 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.

Vendor Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

E-mail address: _____

Signature of Authorized Representative: _____

Printed Name of Authorized Representative: _____

If vendor is awarded the contract, will vendor 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 Vendor’s responsibility to comply with any addenda to this solicitation. Any addenda will be:

- Emailed to known interested vendors, or
- Posted on the City’s website, www.cityofsantacruz.com, under Bidding Information, or
- Vendors may contact Tiffany Wise-West, Sustainability and Climate Action Manager at 831-420-5433 or email twise-west@cityofsantacruz.com.

How many addenda were issued for this solicitation? _____

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.

Vendors 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 vendor. If exceptions are not explained, the Vendor will comply with the specifications as stated in this solicitation.

Firm's qualifications experience and references

- 1) Describe business background and qualifications, technical capacities including year business was established.
- 2) Describe experience doing similar work for other public agencies.
- 3) Provide the location of office which will be performing work for City of Santa Cruz.
- 4) 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, the phone number and weblinks to deliverables produced for those clients.

Project understanding and proposed work plan

- 5) Clearly define all work your business proposes to do for the City. Include a list of deliverables and a work schedule.
- 6) If you will subcontract portions of the work, list all subcontractors to be used. Include business name, address and phone number.
- 7) Demonstrate understanding of and ability to conduct advanced financial analysis of climate action, green economy, and decarbonization strategies.
- 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.

Innovative, flexible and progressive approach

- 9) Describe the approach to the work including specific mechanisms to ensure flexibility and innovation to produce a progressive CAEP 2030 that is also realistic.
- 10) Describe innovative tools or approaches successfully employed in other jurisdictions that might be applied to this project.
- 11) Describe role of equity in this climate action planning process.

Project team qualifications and demonstrated ability to work with diverse stakeholders

- 12) Provide background of personnel on the project team that will be assigned to provide this service to the City.
- 13) Demonstrate ability of the project team to work collaboratively and cross-disciplinarily with a diverse city team and stakeholders

SECTION 7: FEE SCHEDULE

- Detail all costs incidental to the purchase of Consulting Services as specified herein to develop the Climate and Energy Action Plan 2030. Include all costs in your proposal. Vendor will not be allowed to charge for costs not listed in the proposal.
- Describe under what circumstances that City would be charged for additional work.

The following Local Business and Locally Owned Business Preference will reduce the pricing evaluation criteria (as shown in RFP section 3.5) for bid evaluation purposes. The contract will be awarded for the full amount of the bid.

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: _____