



## **REQUEST FOR PROPOSALS (RFP)**

### **BUSINESS IMPROVEMENT DISTRICT EVALUATION & ACTION PLAN**

**PROPOSALS MUST BE RECEIVED BY  
5:00 PM ON THURSDAY, AUGUST 1, 2024**

City of La Verne  
3660 "D" Street  
La Verne, CA 91750

**RFP Issue Date:** Thursday, June 20, 2024

**Proposal Name:** Business Improvement District Evaluation & Action Plan

**Proposal Due Date:** **Thursday, August 1, 2024** by **5:00 PM**

**Questions:** Please direct any questions or concerns to [ablockinger@cityoflaverne.org](mailto:ablockinger@cityoflaverne.org) in writing by 5:00 PM on Thursday, June 11, 2024. Only questions with “**Business Improvement District Evaluation & Action Plan Question**” in the subject line will be accepted. Answers to submitted questions will be posted on the Planet Bids portal.

**Proposal Submitted To:** Proposals must be submitted electronically for the exact item(s) requested in the RFP specifications. Proposals must be submitted through Planet Bids at:  
<https://pbsystem.planetbids.com/portal/45040/portal-home>

**Due Date and Delivery:**

Proposals are to be submitted electronically online. Proposals must be for the entire scope of services outlined in this RFP. Incomplete proposals will not be considered. The electronic bid system will close exactly at the date and time set forth in this RFP, **5:00 PM, on Thursday, August 1, 2024**. All applicable forms required to be completed per the RFP shall be submitted electronically prior to the RFP deadline. **Hard copies will not be accepted.** It is the Proposer’s sole responsibility to ensure that their proposal is received as specified. Proposals may be submitted earlier than the date(s) and time(s) indicated.

Proposals must be submitted through Planet Bids at:  
<https://pbsystem.planetbids.com/portal/45040/portal-home>

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## **SECTION I: GENERAL INFORMATION**

### **A. BACKGROUND**

The City of La Verne is located along the foothills of the San Gabriel and Pomona Valleys. La Verne was founded in 1887 and incorporated in 1906, is approximately 35 miles east of Los Angeles, and has a population of over 33,000. The City maintains a council-manager form of government in which the City Council develops and establishes ordinances and policies in the best interest of its citizens.

In 1987, a group of business owners approached the City Council to establish a Business Improvement District aimed at facilitating the rehabilitation of the old city core. This initiative led to the transformation of Old Town La Verne into a thriving district, now home to over 80 unique owner-operated businesses and the University of La Verne, all nestled within a historic residential community boasting many homes over 100 years old. The Board of this District is tasked with planning and organizing promotional events and marketing materials, making budget recommendations, and planning physical improvements within the Old Town La Verne District. Separately, the Old Town business owners have also established the Old Town La Verne Business Association (Association), a 501(c)3 non-profit organization, primarily focused on marketing the district. This association represents and promotes the business community, hosting several successful events each year, such as the Cool Cruise Car Show, Wine and Beer Walks, and the Holiday Stroll.

### **B. OBJECTIVE**

The City of La Verne is seeking a qualified firm to independently assess and evaluate the Old Town La Verne Business Improvement District (OTLVBID) to analyze current practices against known BID best practices to identify areas of improvement for the OTLVBID organizational structure, programs and outreach strategies, and fiscal sustainability. The findings will be consolidated into an Action Plan, including feasible projects/events, partnerships, funding opportunities, and implementation timelines. The OTLVBID and Association's relationship should be reviewed to best align the operations, event planning, and finances to meet the needs of the Old Town La Verne businesses within the District and successfully position the District through coordinate marketing, event planning, and administration. The City and OTLVBID encourage the consultant to propose additional improvements, suggestions, and performance objectives for the OTLVBID based on the consultant's expertise and experience in assisting other BIDs improve their operations.

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## **SECTION II: SCOPE OF WORK**

Project tasks shall include, but are not necessarily limited to, those items noted below. If the consultant feels that additional tasks are warranted, they must be clearly identified in the consultant's proposal. In preparing a response to this RFP, the consultant shall adhere to the Proposal Format detailed in the RFP and must describe the methodology and techniques that it will use, time and staffing resources allocated, anticipated meetings, and costs involved in addressing each of the following tasks. Please note that the following tasks are applicable to both the BID and the Association. **All references to "meeting(s)" will mean face-to-face meetings and not conference calls.**

1. Evaluate the governance, management, and operational frameworks of the OTLVBID to identify strengths, weaknesses, and areas for structural improvement.
2. Analyze current programs and outreach efforts for effectiveness, relevance, and efficiency. Identify successful initiatives and areas needing enhancement or re-alignment with the district's goals.
3. Conduct a thorough review of the OTLVBID's financial health, revenue sources, expenditure patterns, and financial management practices. Identify financial strengths, vulnerabilities, opportunities for increased efficiency, and potential new funding sources.
4. Reference relevant community demographic and economic data, community visioning, and stakeholder group engagements to capture the vision of our residents, an assessment of our local economic climate, and the City's capacity for additional growth.
5. The evaluation must include a competitive assessment focused on comparing La Verne to competitor business improvement districts comparable in size, accessibility, proximity to tourism, age of development, business make-up, and any other socioeconomic indicators the consulting firm recommends.
6. Develop a 5-Year Action Plan that identifies priorities and initiatives for the OTLVBID, methods for implementation, and best practices to achieve economic growth. This process should include aspects of community feedback through stakeholder engagement. The Action Plan should take into consideration the City's Old Town La Verne Specific Plan and other relevant Plans.
7. Include potential funding opportunities, partnerships, and resources needed to implement the action plan.
8. Develop a realistic timeline for executing the proposed improvements, specifying milestones and deliverables.
9. Maintain monthly summary reports throughout the scope of work, updating the OTLVBID on progress.
10. Prepare and deliver two presentations, one for the La Verne City Council and one to the OTLVBID Board, summarizing the evaluation findings and the proposed action plan.
11. Provide 12 printed and bound copies of the completed evaluation and Action Plan along with an electronic version. This report should be a comprehensive document

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detailing the findings from the assessment of the OTLVBID's organizational structure, programs, outreach strategies, and fiscal health.

12. Provide an optional task in the scope of work as a separate cost proposal for the redesign the OTLVBID website and developing an outreach strategy to be more engaging and reflective of the district's needs.

## **SECTION III: PROPOSAL SUBMITTAL REQUIREMENTS**

### **A. TENTATIVE SCHEDULE OF EVENTS**

The following is a tentative schedule of this entire RFP process. While the City will attempt to apply the necessary resources to maintain this schedule, the following dates are merely projections, and the City reserves the right to modify this schedule as needed to accommodate the completion of this RFP process. The following is a tentative timeline for the evaluation and RFP selection procedure.

RFP Issued	June 20, 2024
Deadline for Written Questions	July 11, 2024
Response to Questions	July 18, 2024
Proposal Submittal Deadline	August 1, 2024
Review of Proposals	August 2024
Council Review and Approval	September 2024
Contract Start Date	September 2024

### **B. SUBMISSION OF PROPOSALS**

The Proposal shall include the following:

- 1. Cover Letter**

- i. Maximum of two (2) pages
- ii. Address to City Manager Ken Domer

- 2. Executive Summary**

- i. In a brief narrative, describe the proposed solution by setting forth the overall approach and plans to meet the requirements of the RFP. The intent of this narrative is to convey to the City that the firm understands the objective of the requested service, the nature of the work, and the level of effort necessary to successfully provide the defined services. The narrative should stipulate how the firm's approach and plans to provide the services are appropriate to the tasks involved.

- 3. Scope of Work**

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- i. Describe the firm's approach to managing the project, including an implementation plan that describes in detail the specific plans to manage, control, and supervise the project in order to ensure satisfactory provision of services.
- ii. Provide a project timeline designed to meet the requirements of the City, as well as scheduling and control methodology that will be used to ensure the schedule will be met. The timeline should include key milestone dates and a detailed description of key project steps.
- iii. Provide a description of the implementation plan considerations, including estimated time frames and deliverables for various stages of the project.
- iv. Detailed description of the specific tasks you will require from City staff. Explain what the respective roles of City staff and your staff would be to complete the tasks specified in the Scope of Work.
- v. Provide a detailed description and/or examples of your quality control procedures that ensures all work products delivered to the City (i.e., drafts and final versions) are of high-quality, and accurate, and have been thoroughly reviewed prior to delivery to the City.
- vi. Provide examples of reports the firm has prepared that allows for review of the draft/services in a reasonable time frame. The reports should be uniform, professional, and easy to understand. The reports should provide summary level information that includes (but not limited to variance analysis), summary of costs to be allocated and collected by Fund, Department, and or function, and the ability to drill down into varying levels of detail, if so desired. Reports shall also include a summary of all inputs and costs to be allocated that can be used to easily verify the accuracy of the plan.
- vii. Include in the cost proposal the rate for additional meetings, if needed.
- viii. Cost proposal should be all-inclusive to include travel costs and administrative tasks.

**4. References**

- i. Provide at least three (3) references, past and present, of similar size agencies in California using the same service being proposed and indicate the scope of work, date, and the name, email address, and telephone number of the client contact.

**5. Required Statements**

- i. A statement that all charges for services will be a "Not-To-Exceed" fee, as submitted with and made part of said consultant's quote.
- ii. A copy of the consultant's hourly rate schedule and a written statement that said hourly rate schedule is part of the consultant's quote for use in invoicing for progress payments and for extra work incurred that is not part of this RFP.

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- iii. A written statement by the consultant that all federal laws and regulations shall be adhered to notwithstanding any state or local laws and regulations. In case of conflict between federal, state, or local laws or regulations, the strictest shall be adhered to.
- iv. A written statement by the consultant shall allow all authorized federal, state, county, and the City officials access to place of work, books, documents, papers, fiscal, payroll materials, and other relevant contract records pertinent to this project. All relevant records shall be retained for at least three (3) years.
- v. A written statement that the consultant will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin.
- vi. A written statement that the consultant shall comply with the California Labor Code., pursuant to said regulations entitled: Federal Labor Standards provisions; Federal Prevailing Wage Decision; and State of California Prevailing Wage Rates, respectively.

#### **SECTION IV: PROPOSAL EVALUATION**

Proposals will be evaluated on the basis of the response to all provisions of this RFP. Since this solicitation is an RFP as opposed to a Bid, pricing alone will not constitute the entire selection criteria. The City may use some or all of the following criteria and corresponding percentages in its evaluation and comparison of proposals submitted. The criteria listed are not necessarily an all-inclusive list. The order in which they appear is not intended to indicate their relative importance. The City reserves the right to modify the evaluation criteria and percentage of the score as deemed appropriate prior to the commencement of evaluation.

<b>Potential Proposal Evaluation Criteria</b>	
<b>Evaluation Criteria</b>	<b>Points</b>
Qualifications/Experience/References	25
Thoroughness & Understanding of the Project	25
Timeline & Methodology	25
Cost of Services	25
<b>Total</b>	<b>100</b>



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## **SECTION V: GENERAL TERMS AND CONDITIONS**

1. **Read all Instructions.** Please read the entire RFP and all enclosures before preparing your proposal.
2. **Proposal Costs.** Costs for developing proposals are entirely the responsibility of the proposer and shall not be charged to the City. The consultant shall provide all necessary personnel, instruments, equipment, and materials to perform the described services.
3. **Proposal Becomes City Property.** The RFP and all materials submitted in response to this RFP will become property of the City.
4. **Selection of Vendor.** The selection of a vendor will be memorialized in the form of a City Agreement (See Section VI – Enclosures and signed by both parties).
5. **Insurance.** The City of La Verne requires a certificate of insurance prior to the commencement of any work, if applicable. Upon successful selection, the consultant has three (3) business days to provide the certificate of insurance to the City in compliance with the Standard City Agreement.
6. **Incomplete Proposals May be Rejected.** If a Proposer fails to satisfy any of the requirements identified in this RFP, the Proposer may be considered non-responsive and the proposal may be rejected. The City reserves the right to accept or reject any or all proposals or to waive any defects or irregularities in the proposals or selection process.
7. **Responsible Representatives.** The consultant shall assign a responsible representative and an alternate to perform the assigned tasks. Both staff members shall be identified in the proposal. The consultant's representative will be responsible for all duties from contract negotiations through project completion. If the primary representative is unable to continue with the project, then the alternate representative will become the primary representative. Any other changes in responsible representative must be approved, in advance, by the City. The City will have the right to reject other proposed changes in personnel and may consider any other changes in responsible personnel a breach of contract
8. **City Business License** – The selected proposer shall be required to obtain a City of La Verne Business License prior to commencing any work in La Verne.
9. **Locality Preference.** The City of La Verne reserves the right to have preference towards local bidders.

## **SECTION VI: ENCLOSURES**

Enclosure 1     Standard City Agreement

