City of Lompoc

Request for Proposals
RFP No. 2813 – Retail Recruitment
Consultant Services

February 25, 2016

Notice is hereby given that sealed Proposals will be received per the attached specifications, at the office of the Purchasing and Materials Manager, 1300 West Laurel Avenue, Lompoc, California, until 2:00 p.m. on March 22, 2016. Proposals will not be publicly opened and read. If further information is needed, contact Maria Villarreal at (805) 875-8001.

Please immediately complete the Proposer Contact Information Sheet and fax to 805-735-7628 to be added to the list to receive all clarifications and addendums.

The only authorized City contact will be the Purchasing Officer listed below or other contact through Purchasing Office Staff, from the original issue date until the contract is awarded. Interested bidders or their representatives are not allowed to communicate with City staff regarding this solicitation. If any bidder is found to be in violation of this provision, the City reserves the right to reject their bid.

It is the responsibility of the proposer to see that any proposal submitted shall have sufficient time to be received by the Purchasing Office prior to proposal opening time. **Late proposals will be returned to the proposer unopened**. The receiving time in the Purchasing Office will be the governing time for acceptability of proposals. Proposals will not be accepted by telephone or facsimile machine. All proposals must bear original signatures and figures. We require one (1) original proposal with original signatures plus three (3) copies for evaluation purposes.

BID PROTEST: Interested parties wishing to protest City solicitation documents may obtain a copy of Lompoc Code, Chapter 26, Section 2642, Section 26 by calling the Purchasing Office at 805-875-8000 or on the City's web site at: http://bit.ly/yoRFLm

Maria Villarreal

Maria Villarreal
Buyer

Dated: 02/25/2016
Published: 02/26/2016

Introduction

I. SUMMARY

The City of Lompoc (City) invites interested and qualified consulting firms and/or individuals to provide consultant services to develop a retail development strategy that maximizes the retail and restaurant potential for the City of Lompoc as well as provides business retention tools and an analytic portal to customize reports. The City is issuing this Request for Proposal (RFP) in order to attract consultant proposals that focus on retail recruitment strategy that focuses on facilitation of retail growth and retention in the City. Thus, the City seeks an Analytics and Retail Recruitment Consultant to provide a market and leakage analysis as well as actively assist the City of Lompoc in selection and location of retail and business recruitment. The City invites all consultants interested in conducting proposals for this analytic assessment and active recruitment partnership to submit a sealed proposal to the Purchasing Division at the City of Lompoc by **March 22, 2016 at 2:00 pm.** This RFP will outline the scope of the project and provide information on qualifications, costs, and evaluation criteria needed to respond to this request.

The goal of the overall project strives to address the following four key phases:

1. Market Analysis Report
2. Development of a- 'Results Driven' Retail Recruitment Plan
3. Implementation of the plan
4. Marketing and Representation

II. BACKGROUND

The City is conveniently located in a coastal area that supports growth of a self-sustaining city. While retail options surround the City of Lompoc with neighboring cities of Santa Barbara and San Luis Obispo, the potential for Economic Development within the City is vast. The City invites a broad range of retail, hospitality, and industrial development to contribute to its growing market.

The successful firm/individual will conduct a site assessment of the City's market trade area and profile the customer's buying habits, lifestyle characteristics and media habits. The results of the assessment will be used to guide the elected officials and City staff to make decisions and commitments to grow the City's retail sector and shape goals and policy long term.

a) The Retail Recruitment and Retention Assessment Analysis should take into consideration and include the following key points for Assessment Portion (Phase 1): *Deliverable: Market Analysis Report*

- Population and household increases
- Competition
- Existing retail firms
- Retail Leakage and Surplus
- Retail Development in similar cities
- Cannibalization

- Retail trends
- Key psychographics
- Market Viability
- Report tools for existing and local retailers
- Healthcare Assessment Report
- Platform to customize all reports

b) Development of a successful "results driven" Retail Recruitment Plan will aid the City of Lompoc in recruiting retail development by listing the following (Phase 2):
Deliverable: Retail Recruitment Plan

- Identification of short and long term goals for the City's economic sector
- Identify appropriate prospective retailers suited for the City's needs
- Recognize the strengths and weaknesses of the City's retail market
- Identify sites for potential retail development

c) The utilization of the analysis report and the development of the Retail Recruitment Plan should result in the consultant assisting in implementation which should include (Phase 3 and 4):
Deliverable: Marketing and recruitment materials to implement development goals, an active representation of the City which includes generating and responding to leads, recruit and land new retail tenants for Lompoc.

- Contacting and attracting potential retailers
- Work with local officials, property owners, real estate brokers, and other stakeholders to build and retain the retail sector
- Represent the City at regional and national conferences for the duration of the contract and generate recognition to the City of Lompoc for prospective retailers
- Assist in production of marketing materials for use by retail prospects, both physical and digital versions to enhance the City of Lompoc's retail environment

While the project is not limited to the preceding, it should strive to include and address these key factors.

III. SCOPE OF SERVICES

In seeking the consultant that fits our selection criteria the best, the City of Lompoc expects the selected firm to address the following concerns throughout the different phases set forth in this RFP:

- Develop trade area analysis focused on drive time delineation
- Develop profiles of customers in the trade area based on purchasing habits, media habits, and lifestyle characteristics
- Assess the retail potential of sites in the city and unique demographic attributes
- Recommend specific retailers and restaurants that match the City's customer profile
- Match the customer profiles with profiles of specific retailers and restaurants that would consider the City for a location or expansion
- Prepare custom marketing packages for each of the retailers and restaurants identified

- Provide analytic Customer Propensity Reports to assist local retailers with merchandising and marketing decisions
- Provide a retail leakage/ surplus analysis
- Provide an online database and marketing tool to assist recruitment efforts
- Provide on-going support to the City throughout the recruitment process
- Provide long-term partnership with unlimited access to GIS and staff to help optimize marketing efforts
- Provide information required to retaining and attracting high value, high-wage jobs by analyzing how the city benchmarks against competing cities
- Provide information to understand residents, access to services, retail, healthcare, municipal assets and other attractive amenities for overall quality of life benchmarks
- Provide an in depth segment assessment of the City
- Ability to provide access to visitor data from credit card transactions
- Educate local retailers on benefits of analytics program for existing businesses
- Provide regular project reports and presentation of data that is driven to demonstrate a return on the investment to the City

IV. PROPOSAL FORMAT

In order to be considered during the proposal evaluation, all materials requested herein must be submitted by the proposal deadline of **Tuesday, March 22, 2016.** Decision factors on a suitable consultant will include pricing as well as the consultant's understanding of the City's needs and requirements, proven record and documentation of success, and the consultant's interest in supporting and strengthening the City's economic vitality.

Submittal Requirements

- Interested consulting firms must submit one original and three (3) hard copies by the proposed deadline. All documents submitted to the City of Lompoc Purchasing Division shall become property of the City
- Pricing of the desired project needs to be included in proposal packet

V. TARGETED DATES

The Economic Development Department for the City of Lompoc strives to remain on a timeline that is appropriate and gives adequate time to all prospective consultants to complete proposals in a wholesome and fair manner. Proposals must be submitted in both physical and electronic form.

Issue RFP to prospective bidders	February 23, 2016
Deadline for questions on RFP	March 8, 2016
Proposal Submittal Deadline	March 22, 2016
Proposal Evaluation	March 23- April 6, 2016
Selection and Contract Negotiation	April 7-8, 2016
Bid Award and Contract Start	April 11, 2016

VI. COST OF SERVICES AND CONTRACT TERM

Each proposal is required to include a quotation of rates, fees, or charges and all other costs in a detailed cost proposal or a cost breakdown. All proposals will be considered and evaluated in conjunction with the budget of the City of Lompoc allocated for the firm/consultant. Further inquires on cost and budgeting can be directed to Maria Villarreal, m_villarreal@ci.lompoc.ca.us.

The City of Lompoc desires a two year contract with an option to renew for two additional years due to the City's biannual budget. When the selected consultant is chosen, the contract will discuss in detail the terms and conditions of the project, and any negotiations must be made at that time. The proposed contract term of two years will begin from time the contract is signed.

VII. FIRM QUALIFICATIONS

A qualified and acceptable consultant firm should possess the following criteria:

- Experience in preparing retail recruitment plans to address the needs of the City
- Experience in locating and working with a diverse group of retailers
- Knowledge and background in obtaining funding sources
- Experience in working with municipal government
- Three (3) client references
- List of personnel to be assigned to the proposed project

VIII. CLIENT REFERENCES

In addition to the submittal of the proposal requirements, the City of Lompoc asks prospective consultants and individuals to provide at least three (3) references for successfully completed projects that have some measure of comparison to the project outlined for the City of Lompoc. With these references please include:

- Contact name, address, phone number, e-mail address
- Project outcomes including budget
- Scale of services that the consultant provided

IX. PROPOSAL EVALUATION CRITERIA

The City of Lompoc will follow a set rubric for evaluating all submitted proposals and evaluation will be determined according to the following factors. It is expected that upon awarding, the selected firm will begin work as soon as negotiation is confirmed. The points of evaluation are as follows:

a) Consultant's performance record in addressing the needs and requirements of their previous customer's cities, ability to meet deadlines, quality of work and remain within budget
b) Degree and cost of Consultant support that will be available throughout the entirety of the contract. While cost is not the defining factor, it will play a considerable role in determination

c) Industry experience that the consultant holds in producing quality Retail Recruitment Plans and how successful implementation of those plans are
d) Quality of marketing materials and data analysis
e) The number, type and experience of consultant staff and their ability to work with Lompoc's municipality
f) The customization of proposal to meet the needs of the City of Lompoc, specifically and the depth of understanding regarding local retail trade area
g) Project approach and methodology including a demonstration of complete understanding of the scope of the project and proposed project schedule

The following points will be combined into four (4) categories to create a grading scale as follows:

Experience (30%)
Staffing & References (30%)
Marketing Materials (20%)
Cost (10%)

IX. ADDITIONAL REQUIREMENTS

Each consultant should confirm ability to provide the following differentiators:

- *Personalized Content*
  Advance the City's business recruitment program by receiving personal guidance from professional staff and ongoing insight into key industry topics via e-newsletter, webcasts, and other interactive tools
- *Long-Term Partnership*
  Provide unlimited access to consultant staff. Provide access to booth space to help optimize marketing efforts at the International Council of Shopping Centers (ICSC) annual meeting in Las Vegas, NV and other tradeshow and conferences that fit the needs of the recruitment strategy developed for the City of Lompoc
- *Exclusive Access*
  Utilize relationships to access data and develop an actionable program to recruit retail
- *Web-Based Deliverable*
  Access to an online web-mapping platform, which allows for mobility and ease of use to assist in business growth objectives
- *Retail Experience*
  Maintain a national market presence and display a useful knowledge of the retail industry
- *Access to datasets*
  Access to distinct data sets ranging from household level consumer information to various relative geographic variables
- *Education*
  Provide education to staff, elected officials and businesses on the benefit of analytic data

X. RESERVATIONS

This RFP does not commit the City to award a contract or to pay any costs incurred in the preparation of a proposal. The City reserves the right to accept or reject any proposal at the City's sole discretion. Although the City's intention is to enter into a contract encompassing the scope of work contained herein, the City reserves the right to reduce or otherwise modify/negotiate the Scope of Work. Program implementation is contingent upon City of Lompoc City Council approval.

----------END OF SPECIFICATIONS ----------

PUBLIC DOCUMENTS

All proposals submitted in response to this RFP shall become the property of the CITY and will be a matter of public record, subject to the State of California Public Records Act (California Government Code Section 6250 et seq.). Proposers must identify, in writing, all copyrighted material, trade secrets or other proprietary information that it claims is exempt from disclosure under the California Public Records Act (CPRA).

Any Proposer claiming such an exemption must identify the specific provision of the California Public Records Act that provides an exemption from disclosure for each item that the Proposer claims is not subject to disclosure under the Act.

Please note that wholesale use of headers/footers bearing designations such as "confidential," "proprietary," or "trade secret" on all or nearly all of a proposal is not acceptable, and may be deemed by the City as a waiver of any exemption claim. The identification of exempt information must be more specific.

In addition to the requested copies under SUBMISSION REQUIREMENTS, all Proposers must supply one unbound, complete, duplicate copy of its proposal with those specific items claimed as exempt clearly marked (redacted). This copy must identify what specific information (if any) in their proposal that they claim, in good faith, is exempt from disclosure under the CPRA.

Any Proposer claiming such exemption must also state in the proposal the following: "The Proposer agrees to indemnify the City and its officers, employees, and agents, and hold them harmless from any claim or liability and will defend any action brought against the City for its refusal to disclose copyrighted material, trade secrets, or other proprietary information to any person making a request therefor." Failure to include such a statement shall constitute a waiver of a Proposer's right to exemption from disclosure.

List any PUBLIC RECORD (CPRA) Exempt Items

(Complete and return)

Bidder Name: _____

Proposers must identify, in writing, all copyrighted material, trade secrets or other proprietary information that it claims is exempt from disclosure under the California Public Records Act (CPRA). You must check one of the options below.

( ) CPRA Exempt Items Listed itemized below or ( ) No CPRA Exempt Items

Page	Line No.	CPRA Provision that approves non disclosure

Use an additional page if necessary titled "CPRA Exempt Items."

The Proposer agrees to indemnify the City and its officers, employees, and agents, and hold them harmless from any claim or liability and will defend any action brought against the City for its refusal to disclose copyrighted material, trade secrets, or other proprietary information to any person making a request therefor.

Signature

Print Authorized Name and Title

Date

Attachment A
City of Lompoc, Bidder References

List and describe fully the last three contracts performed by your firm which demonstrate your ability to provide the supplies, equipment, or services included with the scope of the Proposal specifications. Attach additional pages if required. The City reserves the right to contact each of the references listed for additional information regarding your firm's qualifications.

Reference No. 1

Customer Name:_____

Contact Individual:_____ Phone No:_____

Address: _____

_____

_____

Contract Amount:_____ Year:_____

Description of Supplies, Equipment, or Services Provided:

_____

_____

Reference No. 2

Customer Name:_____

Contact Individual:_____ Phone No:_____

Address: _____

_____

_____

Contract Amount:_____ Year:_____

Description of Supplies, Equipment, or Services Provided:

_____

_____

Reference No. 3

Customer Name:_____

Contact Individual:_____ Phone No:_____

Address: _____

_____

_____

Contract Amount:_____ Year:_____

Description of Supplies, Equipment, or Services Provided:

_____

_____

PROPOSAL SIGNATURE FORM
(Complete & return)

Responding to a Request for Proposal the undersigned proposer agrees to provide professional services in accordance with the specifications.

All information submitted by proposer, including signatures, must be original. Copies will not be accepted. The representations herein are made under penalty of perjury.

We hereby certify:
- That this proposal was not made in the interest of or on behalf of any undisclosed person, partnership, association or corporation.
- That this proposal is genuine and not collusion or sham; and that we did not, directly or indirectly, induce or solicit anyone else to submit a false or sham proposal.
- That we have not, directly or indirectly, by agreement, communication or conference with anyone attempted to induce action prejudicial to the interest of the City of Lompoc, or any other proposer or anyone else interested in the proposed contract; and further,
- Did not, in any manner, directly or indirectly, seek by agreements, communications, or conference with anyone to raise or fix any overhead, profit, or cost element of this proposal price, or that of anyone else.

REGULATED COMMUNICATIONS

On May 20, 2014, the City Council introduced Ordinance No. 1603(14) amending the Purchasing section of the Lompoc Municipal Code adopted regulations related to certain communications during the City Procurement Process.

The Regulated Communications Ordinance can be found at the following web address: (http://www1.cityoflompoc.com/councilagenda/2014/140520/140520n07a01.pdf). The Ordinance generally provides that no bidder shall engage in any communication to or with any City elected official concerning or touching upon any matter which is the subject of this competitive procurement process without disclosing the communications as prescribed in the Ordinance.

Any bidder or elected official who engages in any regulated communication outlined in the Ordinance shall file the written disclosure required by the Ordinance.

Any bidder violating the Ordinance may be disqualified or determined to be non-responsible. Additionally, the City may set aside the award of a contract, prior to its execution, to a party found to have violated the Ordinance.

In addition to Ordinance No. 1603(14), from the original issue date through the contracting period, the only authorized City contact will be the Purchasing Agent or the Finance staff contact listed in Section 7.6 above. Interested Proposers or their representatives are not allowed to communicate with other City staff regarding this solicitation. If any Proposer is found to be in violation of this provision, the City reserves the right to reject their proposal.

We hereby offer to provide the City of Lompoc with the above material and/or service at the prices shown and under the terms and conditions printed hereon or attached or referenced.

(Please type or print)

COMPANY NAME	SIGNATURE OF AUTHORIZED REPRESENTATIVE
ADDRESS	NAME AND TITLE (PLEASE PRINT)
CITY, STATE AND ZIP CODE	E - MAIL ADDRESS
PHONE NUMBER	WEB PAGE
FAX NUMBER	DATE

General Terms and Conditions

The sole point of contact in the City for purposes of this RFP is the Procurement Officer. All communications regarding this solicitation are to be made solely through the Procurement Officer or his/her designee. Only information communicated by the Procurement Officer or his/her designee shall be the official position of the Department. Questions regarding this solicitation must be directed in writing to the Procurement Officer or the designee.

City of Lompoc
Attn: Maria Villarreal, Buyer
1300 West Laurel Avenue, Building 4A
Lompoc, CA 93436

1. The Issuing Office must receive proposals by 2:00 p.m. on the date indicated above. Copies are to be submitted in sealed envelopes in accordance with. The Proposal Project number and due date must appear on the outside of the submission envelope.

2. Late proposals, late requests for modification, or late requests for withdrawal will not be considered. It is recommended that proposals be hand delivered.

3. Vendors responding to this solicitation must meet all mandatory requirements contained herein. If the vendor does not meet a mandatory requirement, the Department will classify their proposal as "Unacceptable". The Department may also determine that a vendor is "Not Responsible", i.e., does not have the capabilities in all respects to perform the work required. Should a proposal be found unacceptable or if a vendor is found not responsible, the offer will not be considered further.

4. An award is final only upon approval by the appropriate office of the City of Lompoc and execution on behalf of the City. State.

5. The Department reserves the right to amend this solicitation at any time prior to the proposal due date. If it does become necessary to amend any part of this solicitation, the Procurement Officer will furnish an addendum to all registered proposers. All amendments will be identified as such and will be sent by mail, and facsimile machine.

6. Amendments shall be distributed within a reasonable time to allow vendors to consider them in preparing their proposals. If the time and date for receipt of offers does not permit preparation, the due date will be extended.

7. The Department may cancel this solicitation as provided by Lompoc City Code and reject all proposals submitted in response when this action is determined to be in the City's best interests.

8. The Department reserves the right to accept or reject all proposals, in whole or in part, and to waive or permit cure of minor irregularities.

9. A public opening of proposals will not be held.

10. Proposals should be prepared simply and economically, providing a straight forward, concise description of the Offerors ability to fulfill the requirements of this solicitation. The Department is not responsible for any expenses incurred by Offerors in preparing and submitting proposals in response to this solicitation.

11. All proposals shall be typewritten or written legibly in ink and all proposals shall be signed in ink as specified.

12. Should a vendor find discrepancies in the specifications or contract provisions included in this solicitation, or should there be doubt as to the meaning or intent of any section or subsection herein, the vendor should request clarification from the Procurement Officer. Failure to request a clarification prior to the due date will be a waiver of any claim by the vendor for expenses made necessary by reason of later interpretation of the contract documents; Offerors will be bound to the Department's interpretation.

13. All prices must be firm for 90 days from the date of the proposal opening & be inclusive. Upon award, prices will be in effect for the term of the contract.

14. All proposals submitted by Seller to Proposer should be submitted upon the attached form, completed and signed, (only typewritten or ink shall be accepted with no erasures or corrections unless properly authenticated by

General Terms and Conditions

signature) in accordance with the instructions contained herein.

15. The issuance of this proposal request creates no obligation on the part of the City and the City reserves the unconditional right at its option to either reject all proposals or waive any irregularities or informalities therein. Each proposer shall be in a separate sealed envelope with the proposal number, name of proposer, title of the proposal, date and time due showing on the outside of the envelope.

16. Prompt payment discounts of 20 days or longer will only be considered when comparing proposals, however, if you offer any prompt payment discounts, please indicate this on your proposal.

17. Awards will be made to realize the greatest savings to the City and may not necessarily be the lowest proposal especially where services are of the utmost importance.

18. Submission of a signed proposal will be interpreted to mean that the proposer has thereby agreed to all conditions, instructions, descriptions and specifications contained herein.

19. The only terms that will be honored are those terms included in general and special conditions and instructions, purchase order or other documents issued by the City.

20. All time limits stated are of the essence and must be complied with. Any proposals received after closing time stipulated will be returned unopened.

21. LAWS GOVERNING CONTRACT: The contract shall be in accordance with the laws of the State of California and the County of Santa Barbara, California is the only appropriate forum for any litigation. In the event a suit or action is instituted arising out of any contract, the prevailing party shall be entitled to receive, in addition to its cost, such sum as the court may adjudge reasonable as to attorney's fees and costs.

22. ENTIRE AGREEMENT: Any Agreement resulting from this RFP will consist of the following documents, in order of precedence, and shall be the entire agreement between parties:
    A) Purchase Order
    B) CITY's Request for Proposals
    C) CONTRACTOR's Proposal

22. Time of Proposal Submission: Bids or Proposals shall be submitted so as to be received in the office designated in the Request for Proposals as the time set for opening of Proposals. Lompoc City Code Section 2603.E. reads "Bid Opening. No bid shall be considered which has not been received at the place, and at or prior to the time, stated in the invitation for bids." The official time clock for this bid will be the U. S. Naval Observatory (USNO): http://www.time.gov/timezone.cgi?Western/d/-5/java

    Solicitations opening at 2:00 P.M. PST will be considered late at 14:00:01 PST and will not be accepted or considered. The Purchasing and Materials Manager Agent or his representative designated as the bid opening official shall decide when the time set for bid opening has arrived, and so shall declare to those present. She (or he) shall then personally and publicly open all bids received prior to that time, and when practicable shall read them aloud.

City of Lompoc

"Registered Proposer Information Sheet"

RFP No. 2813 – Consultant Services for Retail Recruitment
Opening Date: March 22, 2016

Please immediately complete and fax this page to (805) 735-7628 to be added to the list to receive all clarifications and addendums.

1. Complete this form (print or type your information).
2. Fax the completed sheet to (805) 735-7628.
3. Circle which method was used to secure proposal package.

Mail **Fax** **Internet**

Company Name	Signature of Authorized Representative
Name of Proposer	Name & Title (please print)
Street Address	E-Mail Address
City, State, Zip Code	
Telephone Number	Date
Facsimile Number	Web Page Address
Contractors License Number	Expiration Date