REQUEST FOR PROPOSAL FOR COMMUNITY OUTREACH AND ENGAGEMENT SERVICES FOR INTEGRATED MASTER PLAN IMPLEMENTATION

August 25, 2025

The Camrosa Water District is seeking a qualified Professional Firm to provide Community Outreach and Engagement services for the District's Master Plan and Capital Improvement Plan Program. Proposals must be submitted to the District no later than Tuesday September 30, 2025, 2:00 pm PDT. Please submit an electronic copy (pdf format) of your proposal by e-mail (preferred) to Brad Milner at bradm@camrosa.com. All emailed, mailed, or hand delivered proposals must be RECEIVED at Camrosa Water District, 7385 Santa Rosa Road, Camarillo, CA, 93012, attention Brad Milner, prior to the same due date/time. Please include the title, "RFP-Community Outreach Services" on all email (subject line) and mailed/hand delivered documents (placed on outside of envelope). Proposals will not be accepted at any other District location. Late proposals delivered by email, mail, or other methods, will not be considered after the due date/time.

The District will hold a nonmandatory preproposal meeting (via MS Teams only) on Tuesday September 9, 2025, at 2:00 pm PDT. Please email requests for this meeting to Brad Milner at bradm@camrosa.com prior to Monday September 8, 2025, 2:00 pm.

Requests for clarification and questions regarding this RFP must be submitted to the District (email only) to Brad Milner, bradm@camrosa.com, (805) 551-3294, prior to Friday September 12, 2025, 4:00 pm PDT.

REQUEST FOR PROPOSAL FOR
COMMUNITY OUTREACH AND ENGAGEMENT SERVICES FOR INTEGRATED MASTER PLAN IMPLEMENTATION
CAMROSA WATER DISTRICT

1. Purpose

The Camrosa Water District (District) is seeking a qualified Professional Consulting Firm (Firm) to provide Community Outreach and Engagement services for the District's Integrated Master Plan and Capital Improvement Plan Program (collectively, CIP Program). This CIP Program focuses on two categories of projects (1) Water Supply Projects and (2) Infrastructure Rehabilitation and Replacement Projects related to potable water, recycled water, nonpotable water, and wastewater. The CIP Program is anticipated to be implemented over the next 15 years, with a combined cost estimate of approximately $150-$200 million, including pipelines, reservoirs, pump stations, wells, and treatment facilities. A primary objective of the outreach program will be to engage the District's customers to shape the Integrated Master Plan and long-term strategic planning. In coordination with District management and staff, the selected Firm shall be responsible for outreach services including, but not limited to the following: develop a comprehensive community outreach and engagement plan to support District strategic planning; District projects; manage the District's community education, outreach, and engagement services; conduct community information collection; coordinate with District consultants; manage in-house and subconsultant staff; and other related as-needed services. **Table 1-1** provides a tentative schedule for the District's solicitation process for selection of the Firm. ALL dates and times are subject to change.

Table 1-1. Anticipated Schedule for RFP and Firm Selection

Action	Date (all dates and times subject to change)
Release RFP	August 25, 2025
Preproposal meeting (Teams only)	September 9, 2025, 2:00 pm
Questions Due	September 12, 2025, 2:00 pm
District's Answers Due	September 16, 2025
Proposals Due	September 30, 2025, 2:00 pm
Review Proposals	Early October 2025
Interviews (if necessary)	October 2025
Selection and Negotiation	October 2025
Board Approval	October 2025
Award Contract / Notice to Proceed	October 2025

2. Background

2.1 District Overview

The District was formed in 1962 under the County Water District Law of the State of California. Today, the District provides potable water, nonpotable/recycled water, and wastewater services to a diverse customer base including the following: approximately 34,000 residents of the cities of Camarillo, Moorpark, Thousand Oaks, and unincorporated Ventura County; four primary schools and California State University Channel Islands; light industry and shopping centers; and a variety of agricultural users. Currently, the District obtains approximately 60 percent of the potable water supply from local groundwater basins, and approximately 40 percent of potable supply from imported state water project water from Calleguas Municipal Water District. Recycled water and nonpotable sources include the recycled water from the District's Camrosa Water Reclamation Facility (CWRF), groundwater, purchased recycled water from the City of Camarillo, and diverted surface water from the Conejo Creek.

2.2 Existing Facilities

Potable water facilities owned and operated by the District include but are not limited to the following: Round Mountain Water Treatment Plant (RMWTP RO; 0.9 million GPD), Conejo Granular Activated Carbon Treatment Plant (GAC Plant; maximum of 1,650 GPM), 180 miles of distribution pipelines, 10 tanks, 7 wells, and 8 pump stations. Wastewater facilities include but are not limited to the following: Camrosa Water Reclamation Facility (CWRF; 2.25 million gallons per day), 74 miles of wastewater collection pipelines, and 6 lift stations. Nonpotable and recycled water facilities include but are not limited to the following: Conejo Creek Diversion Facility, 4 tanks, 3 wells, 5 pump stations, 4 storage ponds, and 37 miles of pipelines. There are approximately 11,000+ potable water connections, including equivalent connections served through master meters, 5,800 wastewater connections, and 400 nonpotable and recycled water connections within the District's service area. The District also serves non-potable and recycled water outside the District to the Pleasant Valley County Water District (PVCWD) for agriculture.

2.3 Current Planning Activities

In October 2022, the District prepared a Strategic Plan that promoted self-reliance and maximizing all available local resources to increase reliability and gain water supply independence. The District completed an assessment of existing facilities in November 2023 that was summarized in the Near-Term Capital Improvements Plan Technical Memorandum and recommended improvements to existing facilities. In July 2024, the District completed the Water Resources Planning Analysis Technical Memorandum that focused on a phased approach for the construction of new facilities to support the District's strategies to promote local water supply resilience and reduce reliance on imported surface water.

Following discussions involving the District Board and staff, potential projects were characterized into two categories: 1) Water Supply, and 2) Infrastructure Rehabilitation and Replacement. The District Board and staff reached a consensus on the projects that would be immediately pursued and those that would need additional analysis and/or preliminary design. The phased approach developed for the Water Supply projects was key to moving forward with the implementation of Phase I and II elements (see the 2024 Water Resources Planning Analysis Technical Memorandum for details). Consensus on the prioritization of Infrastructure Rehabilitation and Replacement projects has allowed District staff to move forward with the high-priority projects.

The District is currently preparing an Integrated Master Plan that brings together the Water Supply and Infrastructure Rehabilitation and Replacement projects (collectively, CIP Program), and initiatives related to potable water, recycled water, nonpotable water, and wastewater. The Integrated Master Plan, including a project implementation schedule, is anticipated to be completed by early 2026. The CIP Program is anticipated to be implemented over the next 15 years, with a combined cost estimate of approximately $150-$200 million, including pipelines, reservoirs, pump stations, wells, and treatment facilities. A primary objective of the outreach program will be to engage the District's customers to shape the Integrated Master Plan and long-term strategic planning.

3. Scope of Services

The District is seeking a Firm to provide community education, outreach, and engagement services for the District's Master Plan and CIP Program. These projects may include construction of new or rehabilitation of existing pipelines, reservoirs, pump stations, wells, and treatment facilities related to the District's potable water, recycled water, nonpotable water, and wastewater.

In coordination with District management and staff, the selected Firm shall provide a comprehensive community outreach and engagement program to identify community priorities and issues for the District's Master Plan and CIP Program. A primary objective of the outreach program will be to engage the District's customers to shape the Integrated Master Plan and long-term strategic planning. The Firm shall develop a comprehensive community outreach and engagement plan to support the District's Master Plan and CIP Program. The Firm shall conduct information collection processes to identify goals, priorities, and concerns for District customers. The Firm shall implement a broad array of community outreach and engagement activities to reach a diverse cross section of the community in the idea-generation and decision-making process for project-specific planning and development as well as long-term strategic planning. The Firm shall also develop and implement an ongoing, multi-faceted communication and outreach program that can be managed by District staff going forward. In addition, the Firm shall manage in-house and subconsultant staff to successfully complete outreach activities, coordinate with District consultants, and other as-needed services.

Services to be rendered by the Firm may include all or some of the services described in Sections 3.2 and 3.3 and may consist of all such services as they are customarily rendered when providing professional community outreach services of this type. Additional items the Firm believes necessary for the successful completion of the project should be included in their proposal and listed as "Optional Tasks".

3.1 Workflow

3.1.1 Project Initiation

District staff will review all accepted proposals for this RFP. District staff will select a Firm (with the potential for more than one) to provide the outreach and engagement services. The District will negotiate a Consultant Agreement ("Agreement"), final scope of work, and a not-to-exceed budget with the selected Firm for Board approval. The Agreement will be executed by and between the District and the Firm. A copy of the sample Standard Consultant Agreement is attached as Appendix "A".

3.1.2 Purchase Orders

After all parties sign the Agreement, the District will issue a Purchase Order with final scope and budget that authorizes the selected Firm to start the work. The District will arrange a kickoff meeting with the Firm to identify the tasks, priorities, and schedules.

For project services that are specifically identified in the Consultant Agreement, for example Task 1 provided below, the Firm shall submit a scope of work and fee proposal to the District's Project Manager. The proposal shall include a detailed scope of work, estimated costs for these services and expenses, labor categories, fixed hourly rates (from the fee schedule included in the Agreement), and project schedule. Proposals from the selected Firm shall be prepared at no cost to the District.

When project services involve work of such nature that the Firm cannot reasonably estimate the time that would be required to provide the services, the District may agree to an Hourly Rate Purchase Order based on the actual hours worked, times the hourly rates indicated in the Firm's binding fee schedule and other approved expenses. A maximum not-to-exceed fee limitation shall be agreed upon for Hourly Rate Purchase Orders. When an Hourly Rate Purchase Order is used, the Firm shall submit detailed time records, documentation for other expenses, project schedule, and such other evidence as the District may require supporting its billing request.

For project services required by the District that are not specifically identified in the Consultant Agreement, but covered under the general Scope of Services, the Firm shall submit a task scope and fee proposal to the District's Project Manager. The proposal shall include a detailed scope of work, estimated costs for these services and expenses, labor categories, and fixed hourly rates that apply only to the specific Purchase Order unless added to the Consultant Agreement by amendment.

The District will continue to engage with the Firm contingent upon their responsiveness, communication, and success in meeting project objectives, including scope, schedule, and budget.

3.1.3 Term of Agreement

The term of the Consultant Agreement is a maximum of two (2) years plus the potential for up to two (2) one-year (1-year) renewal options. Terms of the Agreement to renew on the District's Fiscal Year calendar.

3.2 General Scope of Services

The Firm shall collaborate with the District's General Manager and Project Manager to identify community outreach priorities and strategies. Firm shall be responsible for developing and implementing community outreach and engagement activities in support of District projects associated with new or improvements to existing facilities for water, wastewater, and recycled / nonpotable water. These projects may include construction of new facilities and improvements to existing facilities such as pipelines, reservoirs, pump stations, wells, and treatment equipment.

Firm shall provide a proposal with detailed scope and fee estimate for Tasks 1 to 3 (see Section 3.3), **<u>including key elements of the following for each Task</u>**: project management (see Section 3.2.1), a task plan including workflow sequencing (see Section 3.2.2), plan implementation (see Section 3.2.3), and reporting services (see

Section 3.2.4). Firm shall provide a general scope (fee estimate optional) for Tasks 4 and 5.

3.2.1 Project Management

Firm is expected to manage tasks in a professional, proficient, legal, and safe manner. The Firm shall be responsible for developing and managing all community outreach and engagement activities associated with the District's Master Plan and CIP Program. The Firm shall be responsible for project management services that may include but are not limited to the following:

1. Schedule and lead bi-weekly and as-needed meetings with District staff in person or via internet video.
2. Prepare meeting agendas and distribute them to District staff within three (3) business days prior to the meeting. Prepare a meeting summary and distribute it to District staff within three (3) business days after the meeting.
3. Manage implementation of project scope, budget, schedule, and quality control.
4. Manage and coordinate the District's outreach plan and activities.
5. Coordinate and collaborate with District staff.
6. Manage Firm staff and subconsultants.
7. Administer contracts for subconsultants hired by the Firm.
8. Prepare monthly invoices.
9. Prepare project status reports.
10. Conduct and coordinate briefings and presentations for project District staff.
11. Coordinate planning and other as-needed project management functions as necessary for delivery of projects.
12. Prepare project schedules for community outreach activities.
13. Assist District with preparation of Board Memorandums applicable to the outreach activities.
14. Identify potential outreach challenges in advance and recommend corrective action.
15. Ability to work a flexible schedule to accommodate District needs and be available for on-call activities.
16. Submit all documents and files developed for the project, including electronic files and photos to District via hard copy and electronic storage device (portable data device).

3.2.2 Task Plan Including Workflow Sequencing

The Firm shall define the task-specific outreach program targeted towards outreach for District customers and in support of the District's Master Plan and CIP Program. These services may include but are not limited to the following:

1. Description of how the task-specific plan meets the District's goals, expectations, and concerns.
2. Develop task-specific strategies for customer outreach and engagement.
3. Develop task-specific priorities and workflow sequencing.

3.2.3 Implementation

The Firm shall be responsible for developing and facilitating the task-specific outreach and engagement activities as defined in individual tasks. Firm shall coordinate with District staff as necessary to provide efficient delivery and integration of the community outreach and engagement activities. The Firm shall provide services that may include but are not limited to the following:

1. Conduct targeted task-specific outreach campaigns for District customers. Engage the community in a public feedback process absent of all communication barriers while being inclusive and representative of all voices in the community.
2. Develop task-specific coordinated outreach materials (exhibits, maps, figures, banners, signs, video, newsletter, bill insert, etc.)
   i. District overview promotional video;
   ii. Social media (website, vlog, blog, etc.);
   iii. Mail/print.
3. Conduct task-specific polls and surveys. Develop detailed questions specific to the District's Master Plan and CIP Program and submit them to the District for review and approval.
4. Organize and facilitate task-specific focus groups.
5. Organize and facilitate task-specific public meetings, forums, and workshops.
6. Develop solutions to community outreach challenges and or issues.
7. Develop and maintain a look-ahead schedule for community outreach activities.
8. Meet with the District Board and staff for up to two (2) workshops in person or via internet video.

3.2.4 Reporting Services

Firm shall provide reports as near real-time as possible to allow the District staff to plan and execute the next steps and corrective actions (if necessary) in a timely manner. Firm shall provide a detailed scope of work for reporting services including but not limited to the following:

3.2.4.1 Bi-weekly Status Meetings

Firm shall develop and conduct as-needed bi-weekly project status meetings with the District's Project Manager. Prepare and distribute to District staff a meeting agenda (memo or email format) within three (3) business days prior to each meeting (including supporting materials). Prepare and distribute to District staff a meeting summary (memo or email format) within three (3) business days of the meeting for the District's Project Manager review and approval. The meeting summary will include highlights of key issues, agreed upon action items, assignments, and due dates. These meetings may be conducted in person or via virtual video conference. The bi-weekly status meetings shall include the following information at a minimum:

- Status of each task, activity, and deliverable.
- Project budget, cost or scope changes in budget, expenditures in prior 2 weeks and total to date, anticipated final expenditures/budget, corrective/control measures if necessary.

- Project schedule by task or activity, delays, estimated project completion dates, summary of work completed in prior 2 weeks and total to date, summary of work anticipated to be completed in the next 30 days, issues affecting the schedule and recommended corrective actions to recover the project on-schedule.
- Current project issues and proposed mitigation measures.

3.2.4.2 Monthly Invoice and Report

Firm shall prepare and submit monthly reports and invoices to the District's Project Manager, or his/her designee, in a format prescribed by the District. The report should be comprehensive and include the following:

- Status of each task, activity, deliverable.
- Accomplishments.
- Monthly expenditures and project total (see Section 3.3.6.1 for details).
- Project schedule with monthly details (see Section 3.3.6.1 for details).
- Current project issues and proposed mitigation measures.

3.2.4.3 Additional Meetings and Presentations

Firm shall participate in additional as-needed project meetings, presentations, and public meetings (anticipate approximately 1 per month) on a periodic basis with the District Board, staff, and other potential stakeholders. These meetings may be conducted in person or via virtual video conference.

3.3 Detailed Tasks' Scope of Services

For Tasks 1, 2, and 3, the Firm shall include a scope of work, estimated fee for services and expenses, labor categories, fixed hourly rates, and project schedule. **Firm shall provide a detailed scope of work including a recommended number of activities for each element of the outreach program**. The Firm shall provide services that may include but are not limited to the following:

3.3.1 Task 1 – Master Plan Input Gathering and Analysis

Task 1 objectives include:

1. Enhance stakeholder engagement.
2. Foster a real sense of collaboration with District customers.
3. Gather and analyze feedback.
4. Use feedback to guide Master Plan and CIP Program goals and priorities.

Task 1 scope of services include:

1. Develop comprehensive outreach strategy/plan (timeframes, etc.).
2. Develop coordinated outreach messaging and materials.
3. Conduct targeted education and outreach campaigns designed to inform customers of the upcoming Master Plan outreach;
   i. Targeted mail campaigns;
   ii. Social media promotion;

   iii. Bill inserts/separate mailer.
4. Conduct polls and surveys;
   i. Define objectives and scope;
   ii. Design polls/surveys;
   iii. Question formulation and survey structure;
   iv. Choose appropriate survey tools and platforms;
   v. Distribution and promotion;
   vi. Data Collection and analysis;
      1. Monitor response rates,
      2. Perform data cleaning and validation,
      3. Provide statistical analysis and interpretation,
      4. Summarize key findings,
      5. Present analysis to Board and staff.
5. Organize and facilitate focus groups;
   i. Planning and preparation;
      1. Identify objectives and participant criteria,
      2. Recruit participants,
      3. Develop discussion guides and materials.
   ii. Facilitation;
      1. Choose skilled moderators,
      2. Create a comfortable and open environment,
      3. Manage group dynamics and ensure productive discussions.
6. Organize and facilitate public meetings, forums, workshops.
7. Integration of Feedback;
   i. Collect input from outreach, polls, focus groups, and forums;
   ii. Identify common themes and divergent opinions;
   iii. Assist the District in translating feedback into practical initiatives;
   iv. Assist the District in prioritizing actions based on feedback;
   v. Assist the District to develop actionable strategies;
   vi. Present consolidated findings to the Board and staff.

3.3.2 Task 2 – Master Plan Adoption Outreach (Sequential to Task 1)

Task 2 objectives include:
1. Continue to enhance stakeholder engagement.
2. Foster a real sense of collaboration with District customers.
3. Communicate Master Plan implementation benefits and potential rate impacts.
4. Determine support levels for adopted Master Plan goals and priorities.
5. Use feedback to guide Master Plan and CIP Program implementation priorities and rate-setting.

Task 2 scope of services include:
1. Develop comprehensive outreach strategy/plan (timeframes, etc.).
2. Develop coordinated outreach messaging and materials.
3. Conduct targeted education and outreach campaigns designed to inform customers of the Master Plan Adoption outreach;
   i. Targeted mail campaigns;
   ii. Social media promotion;

    iii. Bill inserts/separate mailer.
4. Conduct polls and surveys;
    i. Define objectives and scope;
    ii. Design polls/surveys;
    iii. Question formulation and survey structure;
    iv. Choose appropriate survey tools and platforms;
    v. Distribution and promotion;
    vi. Data collection and analysis;
        1. Monitor response rates,
        2. Perform data cleaning and validation,
        3. Provide statistical analysis and interpretation,
        4. Summarize key findings,
        5. Present analysis to Board and staff.
5. Organize and facilitate focus groups;
    i. Planning and preparation;
        1. Identify objectives and participant criteria,
        2. Recruit participants,
        3. Develop discussion guides and materials.
    ii. Facilitation;
        1. Choose skilled moderators,
        2. Create a comfortable and open environment,
        3. Manage group dynamics and ensure productive discussions.
6. Organize and facilitate public meetings, forums, workshops.
7. Integration of Feedback;
    i. Collect input from outreach, polls, focus groups, and forums;
    ii. Identify common themes and divergent opinions;
    iii. Develop actionable strategies;
    iv. Translate feedback into practical initiatives;
    v. Prioritize actions based on feedback;
    vi. Present consolidated findings to the Board and staff.

3.3.3 Task 3 – Ongoing Comprehensive Communication/Outreach Strategy (Independent of Tasks 1 and 2)

Task 3 objectives include:
1. Continue to enhance stakeholder engagement.
2. Foster a real sense of collaboration with District customers.
3. Consistently communicate key messaging to customers.
4. Enhance transparency.
5. Provide a program that can be transferred to and be easily managed and implemented by District staff.

Task 3 scope of services include:
1. Develop a consistent, ongoing, comprehensive Communication/Outreach Strategy/Plan (timeframes, etc.);
    i. Determine the modes of communication;
    ii. Determine the timing and frequency of communication.
2. Develop coordinated outreach messaging themes, topics, and materials.

3. Develop materials and templates;
    i. Promotional videos;
    ii. Newsletter;
    iii. News releases;
    iv. Bill inserts;
    v. Social media posts.
4. Develop and utilize various communication channels.
5. Additional engagement methods could include:
    i. Education campaigns;
    ii. Polls and surveys;
    iii. Public meetings and forums;
    iv. Workshops and webinars;
    v. Community event participation;
    vi. District tours;
    vii. New facilities groundbreaking/ribbon cutting.
6. Reporting (as needed);
    i. Compile reports for events facilitated by Firm (include written documents, photographs, video, etc.);
    ii. Present findings to Board and staff;
    iii. Develop recommendations and action plans.
7. Program handoff to District staff;
    i. Provide additional support as needed.

3.3.4 Task 4 – Rate Study/Prop. 218 Outreach

Firm shall provide a general scope of work for Task 4 (fee estimate optional).

3.3.5 Task 5 - Property Tax Initiative Outreach for Pipeline Replacement

Firm shall provide a general scope of work for Task 5 (fee estimate optional).

3.3.6 Additional Services

The District may request the Firm to provide additional as-needed services during this project. The Firm is not required to provide a scope and fee for these services in the proposal. Additional services may include but not limited to the following:

1. Moderate/lead public meetings and events.
2. Prepare supporting text for technical documents.
3. Prepare special studies.
4. Review and comment on the work of other consultants as requested by the District.
5. Prepare Community Outreach and Engagement Summary Report. The purpose of this report is to develop a clear, concise document summarizing the findings of the District's community outreach and engagement process. The report shall be produced for the Board and District customers. Use of graphics is encouraged to help communicate key findings including applicable photographs, video, and written observation logs. The report shall express the key objectives and findings clearly and effectively. The report shall include the

following information at a minimum: executive summary; data and analysis research gathered throughout the process; public comments; details for community engagement process; major themes; and community/stakeholder priorities; recommendations for future outreach activities by the District.

6. Perform other related and peripheral duties as required and necessary for the successful performance of the outreach activities.

3.4 Responsibilities

3.4.1 Management of the Firm

The District will provide overall management of the Firm and the associated Consultant Agreement. The Firm shall take all formal directions from the District's General Manager, District's Project Manager, or District staff assigned the responsibility for supervision of a respective project task. All activities related to the overall administration of the Firm's Agreement with the District will be managed by the District's Project Manager. Inability of the Firm to follow the instructions by the District's General Manager, Project Manager, or designee, may be grounds for breach of contract and termination.

3.4.2 District Responsibilities

The District will make the final selection of a Firm, award of contract, and notice to proceed. The District will provide or make available upon request, reports, data, figures, records, and other data deemed useful for project development. The District will be responsible for the final approval of special studies, reports, and all other technical documents and deliverables. The District will make payments directly to the Firm. The District will continue to engage with the Firm contingent upon their responsiveness, communication, and success in meeting project objectives, including scope, schedule, and budget.

3.4.3 Ownership of Materials and Equipment

All services provided by the Firm, materials, documents, reports, computer files, and other information of all types, and all works based thereon, incorporated therein, or derived therefrom, and all intellectual property and proprietary rights in these materials, documents, reports, and other information of all types, shall be the sole and exclusive property of the District.

4 Proposal Elements

4.1 General

It is strongly recommended that the Firm submit a proposal with the format identified in this RFP to allow the District to properly evaluate and compare the proposals received. All requirements and questions in the RFP should be addressed. The District reserves the right to request additional information which, in the District's opinion, is necessary to ensure that the Firm's competence, number of qualified employees, business organization, and financial resources are adequate to perform according to the Consultant Agreement (Appendix A).

Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Responses should emphasize the Firm's demonstrated capability to perform the services. Expensive bindings and promotional materials, etc., are not necessary or desired. However, technical literature that supports the approach, qualifications, or other elements of the proposal should be included. Emphasis should be concentrated on completeness, approach to the work, team qualifications, project experience, and clarity of proposal.

Firm shall provide a proposal detailing their response to the services defined in Section 3 including the following:

- Cover Letter;
- Approach, Scope of Work, and Schedule;
- Team;
- Project Experience and References;
- Fee Proposal and Labor Rates;
- Comments Regarding the District's Standard Consultant Agreement.

Firm shall provide a letter proposal detailing the elements listed above and limited to a **maximum of thirty (30) single-sided pages** on 8.5-inch x 11-inch paper. Proposals may include 11-inch x 17-inch pages where applicable (counts as 1 page). The page limit excludes covers, table of contents, dividers, resumes, and comments regarding the Agreement. The standard font size shall be a minimum of 11-point font. Resumes (maximum of 2 pages each) shall be included in an appendix. All proposals shall be prepared at no cost to the District.

Failure to follow RFP requirements or include required items with your proposal may be cause for rejection of the proposal as non-responsive.

4.2 Cover Letter

The cover letter shall be on the Firm's letterhead and identify the full legal name and address of the Firm's local office. The Firm is defined as the legal entity that will execute the Agreement with the District. The cover letter shall be signed by an authorized representative (i.e., CEO, President, Principal-in-Charge) of the Firm's organization.

The cover letter shall include the following at a minimum:

- Brief introduction to the Firm, local office, and primary services.
- Summary of proposal in a clear and concise manner.
- Identify the name, title, address, telephone numbers, and email address of the individual who will serve as the Principal-in-Charge for the Firm.
- Identify the name, title, address, telephone numbers, and email address of the individual who will serve as the Project Manager.

4.3 Approach, Scope of Work, and Schedule

4.3.1 General Approach

Firm shall provide a description of the general approach to the potential services identified in Section 3.2 and 3.3 including but not limited to the following: project management, implement outreach and engagement activities, and additional as-needed services. Include a description of your general approach to promoting effective communication with District staff, etc. Provide a description of your general approach to managing external subconsultants to maximize efficiency and productivity.

4.3.2 Scope of Work

Provide a **detailed** scope of work for your proposed approach and strategies for customer outreach and engagement services for Tasks 1 to 3 (Sections 3.3.1 to 3.3.3) including details listed in Section 3.2. Summarize outreach priorities, approach for outreach activities, schedule for outreach activities, and implementation.

Provide a **general** scope of work for your proposed approach and strategies for customer outreach and engagement services for Tasks 4 to 5 (Sections 3.3.4 and 3.3.5) including implementation of outreach activities. Summarize outreach priorities, approach for outreach activities, schedule for outreach activities, and implementation.

Additional items the Firm believes necessary should be included in the proposal and listed as “Optional Tasks”.

4.3.3 Project Schedule

Firm shall include a draft schedule of tasks, milestones, and deliverables that will provide for timely provision of the services identified in Sections 3.2 and 3.3. The schedule may be in a gantt, graphic, or another applicable format.

4.4 Team

Firm shall include an introduction to the project management team, key professional staff, and subconsultant staff as summarized below.

4.4.1 Project Management Team

Include a summary of the proposed management team including the Principal-in-Charge, Project Manager, and Deputy Project Manager, as noted below.

4.4.1.1 Principal-in-Charge

Identify the individual who will have overall responsibility for the Firm's contract, successful completion of the Project, and performance under the Consultant Agreement. Inability of the Firm to follow the requirements noted below may be grounds for breach of contract and termination.

4.4.1.2 Project Manager

The Firm shall designate an experienced senior individual as the single point-of-contact who will serve as the Firm's Project Manager for this project. This Project Manager will be responsible for the coordination and delivery of all services in accordance with the scope of services listed in Section 3. The Firm will not bill the District for managing their in-house staff and subconsultants.

The Project Manager must have training, experience, and licensing as follows:

- Must be an employee of the Firm that is entering into the Agreement with the District.
- Minimum of ten (10) years of experience in community outreach, customer engagement, and event planning for public agency projects.
- Minimum of five (5) years of experience as project manager with primary responsibility for successful execution of scope, schedule, resources, and budget.

Firm's Project Manager shall be approved by the District and shall not be removed or replaced without prior consent from the District. If a change in the Firm's Project Manager is necessary, the Firm shall submit the names and resumes of a minimum of two (2) replacement candidates for District approval a minimum of thirty (30) calendar days prior to the effective day of the change unless otherwise approved by the District. In addition, the District, at its sole discretion, reserves the right to direct the Firm to replace the Project Manager. If the District requests the Firm to replace their Project Manager, then the Firm shall replace the Project Manager with the District's approval within thirty (30) calendar days of the effective date of removal.

The Firm is expected to work closely and dynamically with the District's staff and consultants. For the duration of the Agreement, the Project Manager shall be readily available to interact with District staff including in-person at a District facility, project site, via phone, and internet video call.

4.4.1.3 Deputy Project Manager

Firm shall designate a Deputy Project Manager to serve as a second point of contact for this project. The Deputy Project Manager shall assist the Project Manager with project management and staff management responsibilities. The Deputy Project Manager shall temporarily fill the role of Project Manager when/if the Project Manager is temporarily not available for any reason.

4.4.2 Professional Staff

Firm shall identify key professional staff anticipated to be included in this project. The Firm shall manage all professional staff provided. If a change is needed in key professional staff (i.e., key staff leading tasks for specific District projects; excluding Project Manager as covered in Section 4.4.1.2), the Firm shall submit to the District the name(s) of the replacement personnel a minimum of seven (7) calendar days prior to the effective day of the change, unless otherwise approved by the District. In addition, the District, at its sole discretion, reserves the right to direct the Firm to remove any of the staff assigned to the District's projects.

4.4.3 Subconsultants Staff

Firms shall identify subconsultants (including key staff) anticipated to be used for this project. The Firm shall manage all subconsultant staff hired directly for this project. If a change in subconsultant or key subconsultant personnel (i.e., key staff leading tasks for District projects) is needed, the Firm shall submit to the District the name(s) of the replacement subconsultant or key personnel within seven (7) calendar days of the change. In addition, the District, at its sole discretion, reserves the right to direct the Firm to remove any subconsultant or member of the subconsultant's staff from the project.

4.4.4 Organization Chart

Firm shall summarize the proposed project team via a tabular list and or organizational chart. The Firm shall identify the Principal-in-Charge, Project Manager, Deputy Project Manager, key technical staff, and key subconsultants on the organizational list and chart.

4.5 Project Experience and References

Firm shall demonstrate community outreach experience with public projects similar to the District's Master Plan and CIP Program such as wells, treatment facilities, pipelines, reservoirs, pump stations, etc. related to potable water, recycled water, nonpotable water, and wastewater. Firm shall also demonstrate experience working on District projects, local project experience (within 50 miles of the District), and other applicable projects. Firm shall demonstrate specific applicable experience for the Project Manager, Deputy Project Manager, proposed project team, and subconsultants.

Firm shall include summaries of applicable experience for specific projects (**maximum of 2 pages each**). Provide detailed descriptions of a minimum of three (3) and maximum of eight (8) projects that demonstrate your experience as outreach and engagement coordinator. Please complete the project experience template (see **Table 4-1**) for each project (cells may be expanded to fit size of information). Projects listed shall have been completed within ten (10) years of the due date of this RFP (or projects currently in progress). Photos may be included with the project experience. The District may contact one or more of the clients listed (references) in the proposal to discuss project experience(s) with the Firm.

Table 4-1. Project Experience Template

Name of project	*(increase cell sizes as needed)*
Agency/Company name	
Client contact name (may be used as a reference)	
Client phone number	
Client email address	
Location of project (City, State)	
Summary of project (describe)	
Firm's staff with experience on this project and proposed for the District's project	
Date project completed (or expected to be complete)	
Firm's project fee (or estimate)	

4.6 Fee Proposal and Labor Rates

Upon selection, the Firm and District will negotiate an Agreement for Board approval with a final scope of work for specific projects and total not-to-exceed fee. **Firm shall submit a separate fee proposal (see Section 4.6.3 below).**

Firm shall provide a list of fixed hourly labor rates for Fiscal Year 2025-2026 (the District's fiscal year calendar is July 1 through June 30) for a wide range of staff categories and subconsultants applicable to the scope of services listed in Section 3. The Firm must specify fixed hourly rates that include wages, overhead, and profit. New personnel, staff categories, and subconsultants may be added after contract execution and throughout the life of the contract. The Firm shall submit to the District the name(s) and labor rate(s) of additional and or replacement personnel, subconsultants, and or labor categories within seven (7) calendar days of the change.

Firm will be allowed to request an annual adjustment to labor rates using a value based on the Consumer Price Index – All Urban Consumers (CPI-U) for the Los Angeles area or as otherwise approved by the District. The Firm shall submit an annual written request to the District by April 30 for rates effective at the start of the next fiscal year.

4.6.1 Fee Proposal for Tasks 1 to 3

Firm shall provide a not-to-exceed time and materials fee proposal based on your proposed scope of work for Tasks 1 to 3 (Sections 3.3.1 to 3.3.3). Include the number of labor hours in table format separated by task for Firm and subconsultant staff. Include labor categories, fixed hourly labor rates (from Firm's fee schedule), and expenses for Firm and subconsultant staff. Provide an optional estimated fee for Tasks 4 and 5 as proposed in your scope of work. The Firm may be required to provide fee estimates for future specific tasks also.

4.6.2 Proposal for Non-Specific Projects

The District may approve of an Hourly Rate Purchase Order when the scope of services involves non-specific project(s) of such nature that the Firm cannot reasonably estimate the time that would be required to provide the services (see Section 3.1 for additional details). The District may utilize an approved labor rate schedule and maximum not-to-exceed fee limitation for Hourly Rate Purchase Orders.

4.6.3 Submit Separate Fee Proposal

<u>Firm shall submit a separate fee proposal</u> to contain only enough pages to clearly respond to the information that is requested in the RFP. Please include a separate fee proposal file or separate fee proposal within an envelope. Clearly label the electronic file with "**Fee Proposal for Community Outreach Services**" or label the outside of envelope with "**Fee Proposal for Community Outreach Services**".

4.7 Comments Regarding the District's Standard Consultant Agreement

Firm shall provide comments and or recommended edits to the District's Standard Consultant Agreement (see copy of the District's Standard Consultant Agreement attached as Appendix "A"). Comments and recommended edits by the Firm shall be included in an appendix.

4.8 District's Vendor Questionnaire

Firm shall include a completed copy of the District's Vendor Questionnaire with their proposal (see copy attached as Appendix "B"). Completed Vendor Questionnaires shall be included in an appendix.

5 Proposal Submittal

Table 1-1 (see Section 1) provides a schedule for the District's solicitation process for selection of the Firm. ALL dates and times listed in **Table 1-1** are subject to change. The District will host a preproposal conference call on Tuesday September 9, 2025, 2:00 pm PDT, using Microsoft Teams software. The purpose of the conference call is to discuss the RFP process, scope of services contained in this RFP, and receiving questions. Firms must preregister to participate in the preproposal conference call by sending an email to Brad Milner at bradm@camrosa.com. The preregistration email must include the name of your Firm and contact information for proposed participants including the individual's name, phone number, and email address. Firms must submit the preregistration email prior to Monday September 8, 2025, 2:00 pm PDT. The District may not respond to preregistration emails received after 2:00 p.m. PDT on the day prior to the preproposal conference call. To participate by computer, connect to the meeting invite link (provided by email) and follow the prompts as designated. To participate in the audio portion only, dial the number provided and follow the prompts as designated.

Requests for clarification and questions regarding this RFP must be submitted to the District (email only) to Brad Milner, bradm@camrosa.com, (805) 551-3294, prior to Friday September 12, 2025, 4:00 pm PDT.

Firms shall submit an electronic copy (pdf format) of their proposal (excluding fee proposal) by email (preferred) no later than Tuesday September 30, 2025, 2:00 pm PDT to Brad Milner at bradm@camrosa.com. All mailed or hand-delivered proposals must be **<u>RECEIVED</u>** prior to the same due date/time at Camrosa Water District, 7385 Santa Rosa Road, Camarillo, CA, 93012, attention Brad Milner. Please include the title of the RFP, "**RFP-Community Outreach Services**" on all emails (subject line) and mailed/hand-delivered copies (marked on outside of the envelope). Proposals will not be accepted at any other District locations or considered after the due date/time. All proposals shall be prepared at no cost to the District.

<u>Firm shall submit a separate fee proposal</u> that meets the same due date and requirements as the primary proposal noted above. Fee proposal shall contain only enough pages to clearly respond to the information that is requested in the RFP. Please email a separate fee proposal file or mail/deliver a separate fee proposal within an envelope. Clearly label the electronic file with "**Fee Proposal for Community Outreach Services**" or label the outside of envelope with "**Fee Proposal for Community Outreach Services**".

6 Firm Selection

Firm selection will be primarily based on the proposals submitted. A panel of District staff will perform an evaluation and assign a score to each responsive proposal. The selection process may consist of solely an evaluation of the submitted proposals to determine the top-ranked Firm. The District may decide to include an evaluation of the proposals and panel interviews with a short list of Firms (as determined by the scores of the proposals). If the District decides to conduct interviews with the top-ranked Firms, the District reserves the right to select a Firm (or more than one) based on a combination of the interview scoring and proposal scoring. Proposals will be evaluated using the criteria listed below in **Table 6-1**:

Table 6-1. Criteria and Points for Evaluation of Proposals

Criteria	Points (maximum)
Approach, Scope of Work, Schedule	30
Team and Project Manager	30
Project Experience and References	30
Fee Proposal and Labor Rates	0
Overall Proposal Clarity and Conformance with RFP	10
Total	**100**

Table 1-1 (see Section 1) provides a schedule for the District's solicitation process for selection of a Firm. ALL dates and times listed in **Table 1-1** are subject to change. The District will negotiate and finalize the Agreement for this project with the selected Firm. If the District is unable to finalize an Agreement on terms and conditions for the scope and fee with the selected Firm, the District reserves the right to negotiate with the next most qualified Firm. The District reserves the right to reject any or all proposals; to waive any or all informalities and/or irregularities; to readvertise with either an identical or revised scope; or to cancel the solicitation in its entirety. Nothing in this RFP shall require the District to award a contract for the services included in this RFP.

Appendices

Appendices to this RFP include the following:

> **Appendix A. District's Standard Consultant Agreement and Insurance Requirements**.
>
> **Appendix B. District's Vendor Questionnaire**.

Appendix A

District's Standard Consultant Agreement and Insurance Requirements

Camrosa Water District
7385 Santa Rosa Rd.
Camarillo, CA 93012
Telephone (805) 482-4677 - FAX (805) 987-4797

Some of the important terms of this agreement are printed on pages 2 through 3. For your protection, make sure that you read and understand all provisions before signing. The terms on Page 2 through 3 are incorporated in this document and will constitute a part of the agreement between the parties when signed.

TO:

DATE:

Agreement No.:

The undersigned Consultant offers to furnish the following:

Contract price $:

Contract Term:

Instructions: Sign and return original. Upon acceptance by Camrosa Water District, a copy will be signed by its authorized representative and promptly returned to you. Insert below the names of your authorized representative(s).

Accepted:	Camrosa Water District	Consultant:	
By:	______________________	By:	______________________
	Tony L. Stafford		
Title:	General Manager	Title:	
Date:	______________________	Date:	______________________

Other authorized representative(s): ______________________

Other authorized representative(s): ______________________

Consultant agrees with Camrosa Water District (District) that:

a. **Indemnification:** To the extent permitted by law, Consultant shall hold harmless, defend at its own expense, and indemnify the District, its directors, officers, employees, and authorized volunteers, against any and all liability, claims, losses, damages, or expenses, including reasonable attorney's fees and costs, arising from negligent acts, errors or omissions of Consultant or its officers, agents, or employees in rendering services under this contract; excluding, however, such liability, claims, losses, damages or expenses arising from the District's sole negligence or willful acts.

b. **Minimum Insurance Requirements:** Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries or death to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Consultant, his agents, representatives, employees or subcontractors.

c. **Coverage:** Coverage shall be at least as broad as the following:

   1. **Commercial General Liability (CGL) -** Insurance Services Office (ISO) Commercial General Liability Coverage (Occurrence Form CG 00 01) including products and completed operations, property damage, bodily injury, personal and advertising injury with limit of at least two million dollars ($2,000,000) per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (coverage as broad as the ISO CG 25 03, or ISO CG 25 04 endorsement provided to the District) or the general aggregate limit shall be twice the required occurrence limit.
   2. **Automobile Liability -** (If applicable) Insurance Services Office (ISO) Business Auto Coverage (Form CA 00 01), covering Symbol 1 (any auto) or if Consultant has no owned autos, Symbol 8 (hired) and 9 (non-owned) with limit of one million dollars ($1,000,000) for bodily injury and property damage each accident.
   3. **Workers' Compensation Insurance -** as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than $1,000,000 per accident for bodily injury or disease.
   4. **Waiver of Subrogation:** The insurer(s) named above agree to waive all rights of subrogation against the District, its directors, officers, employees, and authorized volunteers for losses paid under the terms of this policy which arise from work performed by the Named Insured for the District; but this provision applies regardless of whether or not the District has received a waiver of subrogation from the insurer.
   5. **Professional Liability -** (also known as Errors & Omission) Insurance appropriate to the Consultant profession, with limits no less than $1,000,000 per occurrence or claim, and $2,000,000 policy aggregate.

d. **If Claims Made Policies:**

   1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
   2. Insurance must be maintained and evidence of insurance must be provided **for at least five (5) years after completion of the contract of work.**
   3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

If the Consultant maintains broader coverage and/or higher limits than the minimums shown above, the District requires and shall be entitled to the broader coverage and/or higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the District.

Other Required Provisions: The general liability policy must contain, or be endorsed to contain, the following provisions:

a. **Additional Insured Status:** District, its directors, officers, employees, and authorized volunteers are to be given insured status (at least as broad as ISO Form CG 20 10 10 01), with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations.

b. **Primary Coverage:** For any claims related to this project, the Consultant's insurance coverage shall be primary at least as broad as ISO CG 20 01 04 13 as respects to the District, its directors, officers, employees, and authorized volunteers. Any insurance or self-insurance maintained by the District, its directors, officers, employees, and authorized volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

Notice of Cancellation: Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the District.

Self-Insured Retentions: Self-insured retentions must be declared to and approved by the District The District may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or the District.

Acceptability of Insurers: Insurance is to be placed with insurers having a current A.M. Best rating of no less than A:VII or as otherwise approved by the District.

Verification of Coverage: Consultant shall furnish the District with certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the District before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The District reserves the right to require complete, certified copies of all required insurance policies, including policy Declaration and Endorsements pages listing all policy endorsements. If any of the required coverages expire during the term of this agreement, the Consultant shall deliver the renewal certificate(s) including the general liability additional insured endorsement to Camrosa Water District at least ten (10) days prior to the expiration date.

Subcontractors: Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that the District, its directors, officers, employees, and authorized volunteers are an additional insured on Commercial General Liability Coverage.

Other Requirements:

a. Consultant shall not accept direction or orders from any person other than the General Manager or the person(s) whose name(s) is (are) inserted on Page 1 as "other authorized representative(s)."

b. Payment, unless otherwise specified on Page 1, is to be 30 days after acceptance by the District.

c. Permits required by governmental authorities will be obtained at Consultant's expense, and Consultant will comply with applicable local, state, and federal regulations and statutes including Cal/OSHA requirements.

d. Any change in the scope of the professional services to be done, method of performance, nature of materials or price thereof, or to any other matter materially affecting the performance or nature of the professional services will not be paid for or accepted unless such change, addition or deletion is approved in advance, in writing by the District. Consultant's "other authorized representative(s)" has/have the authority to execute such written change for Consultant.

The District may terminate this Agreement at any time, with or without cause, giving written notice to Consultant, specifying the effective date of termination.

Appendix B

District's Vendor Questionnaire

Camrosa Water District

Vendor Questionnaire

In order to complete an agreement with your company, we need you to answer the following question and return the answers.

1. Company name (Indicate DBA if applicable):____

2. Current mailing address: ____

3. Remittance address: ____

4. Brief description of services to be provided:____

5. Name of current responsible principal of company

   _________________________________ _________________________________
   (Print name) (Print title)

6. Is your company a LLC or Corporation? ______________________

7. Signatory(ies) for company:

   _______________________ _____________________ _________________________
   (Print name) (Print title) (Email address)

   _______________________ _____________________ _________________________
   (Print name) (Print title) (Email address)

8. Please provide a copy of your most recent certificate of insurance. Camrosa Water District's minimum insurance requirements can be found at www.camrosa.com/procurement. Please note, Camrosa Water District reserves the right to change or modify limits of liability of coverages based in services provided.

9. Please list a point of contact for your company should we have any questions.

   Name__________________________

   Contact#/Email ____________/______________________________

10. Please provide your current W-9 using the latest W-9 form from IRS. The W-9 must contain an actual signature and not a digital/electronic signature.

11. Please provide contractor's license #____________________

12. Does your company pay prevailing wage? YES/NO

13. Is the company registered with the State of CA Dept. of Industrial Relations? YES/NO

    If yes, please provide PWC Registration Number: ____________________