



**Request for Proposals and Qualifications (RFP)
for Planning Consulting Services for the
CITY OF OAKLEY CLIMATE ACTION PLAN
(CAP)**

RFP RELEASE DATE: January 8, 2024

PROPOSALS DUE BY: 5:00 P.M Wednesday, February 7, 2024



I. Introduction

The City of Oakley is requesting proposals from qualified consultants to provide professional services to assist the City with the creation of its Climate Action Plan (CAP). This Request for Proposals (RFP) is intended to provide interested firms with general information regarding expectations for a professional services agreement (Agreement) to be awarded and the submission process.

The Oakley City Council adopted the City of Oakley Strategic Plan 2022-2027+ (SP27+) in April of 2022. The SP27+ revisits what is important to the diverse communities and recalibrates the City’s collective priorities. The SP27+’s Community and Economic Development Goal states “[t]he City of Oakley will inspire and encourage Community & Economic Development through strategic and thoughtful growth, a business-friendly environment, and local employment opportunities.” Within that goal are several sub-goals, one of which is the Strategic and Thoughtful Growth Sub-goal. That sub-goal includes seven objectives, each split into multiple bullet points. One of the objectives is to “Enhance Environmental Stewardship,” which includes a bullet point to “[i]mplement energy, air quality, and greenhouse gas emissions goals within the Oakley General Plan, including the adoption and implementation of a Climate Action Plan by 2025 that complies with State greenhouse gas reduction targets.” Adoption of the CAP by 2025 that complies with State greenhouse gas reduction targets is also addressed in Policy 6.2.4 and Program 6.2.B, which fall under Goal 6.2 “Energy, Air Quality, and Greenhouse Gas Emissions” of the Oakley General Plan.

The City of Oakley adopted a Strategic Energy Plan in the Fall of 2015 and Greenhouse Gas Emission (GHG) Emissions Inventories for both Community-Wide and Local Government Operations emissions in 2005. An update to the GHG Emissions Inventories was done in 2010 (under single cover). The City has made steps towards meeting goals found in the General Plan and documents mentioned herein; however, it does not have a mechanism in place for effectively or efficiently tracking that progress. The CAP update will include an updated GHG emissions inventory, reduction targets consistent with State targets, and an implementation and monitoring strategy.

The City anticipates the CAP update process to span approximately one year and result in a consultant cost not to exceed \$100,000 (One Hundred Thousand dollars).

II. Estimated Timeline and Response Dates

January 8, 2024

RFP Release Date

February 7, 2024 (Proposals will be accepted until 5:00 P.M.)

Proposal Due Date



Proposals will be accepted until February 7, 2024 at 5:00 P.M.

Ken Strelo, Planning Manager
strelo@ci.oakley.ca.us

Proposals shall be submitted **electronically** via email attachment, Sharepoint (etc.), CD, or USB drive to:

Mailing Address:

City of Oakley
Planning Division
3231 Main Street
Oakley, CA 94561
Attn: RFP Oakley CAP

Incomplete responses, late responses, and/or responses not in compliance with the RFP format and requirements will not be considered.

February 8, 2024 – February 15, 2024

City's selection committee reviews submissions for compliance with RFP requirements and evaluates consultants' qualifications.

By February 22, 2024

Selection committee notifies top consultant for award of the agreement, and all other responders of the City's selection.

III. Project Description and Scope of Work

Staff is seeking experts to develop a forward-thinking and locally relevant plan. The plan should include a realistic number of actionable, achievable, and impactful steps that the City can take to achieve its goals.

The consultant will develop the Climate Action Plan in cooperation with staff, the Planning Commission, the City Council, relevant stakeholders, and members of the community. City staff will work closely with the selected consultant and are prepared to contribute in-house task assistance. The proposal should indicate which tasks/subtasks would be appropriate and/or desirable for City staff to complete and/or may be optional in order to accomplish the estimated budget amount.



The City is seeking proposals that generally reflect the following scope. Consultants are strongly encouraged to suggest refinements and innovative methodologies that ultimately achieve the work products listed below.

TASK 1. EXISTING CONDITIONS, PROJECTIONS, AND TARGETS

Review of Relevant Documents and Legislation

The project should begin with a review of existing documentation, including the following:

- City of Oakley General Plan Focused General Plan Update (Adopted January 11, 2022)
- Oakley 2010 Community-Wide & Local Government Operations Greenhouse Gas Emission Update
- City of Oakley Strategic Plan 2022-2027+ (Adopted April 2022)
- City of Oakley Economic Development Work Plan 2023-2026
- Oakley Strategic Energy Plan (Fall 2015)
- Contra Costa County Local Hazard Mitigation Plan

Additionally, the consultant should review and analyze state and regional programs and legislation to avoid redundancy and determine the appropriate role for Oakley in the next phase of climate mitigation and adaptation.

GHG Emissions Inventory

The first step of the mitigation component is a comprehensive update to the greenhouse gas emissions inventory for both community-wide and local government emissions. The consultant will then forecast projected emissions for activities covered by the plan and establish reduction targets consistent with State targets. Additionally, the consultant will assist the City with establishing a tool or mechanism with which the City can continue to update its emissions inventory on an ongoing basis. This subtask is considered mandatory for the Climate Action Plan.



Vulnerability Analysis

The Climate Adaptation Goal of the General Plan (Goal 8.5) aims to minimize risks to life, property, the economy, and the environment through Climate adaptation strategies that enhance and promote Oakley’s community resiliency. The consultant will springboard from the General Plan and conduct a vulnerability analysis to determine how climate change will affect Oakley, what aspects of Oakley will be affected, how likely the impacts are, and how quickly they will occur. Social vulnerability should be a consideration in this analysis. This subtask is considered mandatory for the Climate Action Plan.

Task 1 Deliverable: Existing conditions memorandum and an emission inventory tool.

TASK 2. COMMUNITY ENGAGEMENT

The planning process should include an outreach component to raise awareness about climate change and to get feedback from the community and relevant stakeholders on potential mitigation and adaptation strategies. The outreach approach may look to implement broad community workshops, pop-ups at existing community events, targeted focus groups, and web-based engagement and analysis tools to communicate and engage with the community and decision-makers. The consultant will be expected to participate in the outreach events. All outreach and public meetings, whether in person or virtual, shall include accessibility for all and the City will favor consultants that can show access to an ADA accessibility expert and how they will achieve this component. This sub-task may include optional components (E.g., number of meetings, type of meetings, etc.) in order to assist the proposal in not exceeding the estimated budget amount.

Task 2 Deliverables: Outreach plan, plan implementation (developing materials, attending/hosting meetings, etc.), outreach summary memorandum.

TASK 3. DEVELOP CLIMATE MITIGATION AND ADAPTATION STRATEGIES

The mitigation strategies will provide a roadmap to reduce greenhouse gas emissions and to increase sustainability by limiting the major sources of greenhouse gas emissions and supporting pathways to sustainability.

The adaptation strategies will outline how the City will improve its response to the impacts of climate change such as increased flooding, heat waves, drought, and wildfires. The consultant should consider adaptive pathways, given the uncertainty in future climate change impacts.



The strategies will be informed by data in the existing conditions memorandum and stakeholder input and will help implement the goals and objectives. The strategies will be analyzed with a data-driven approach to identify the most cost-effective and beneficial projects. Each strategy will be evaluated based on how effectively the strategy supports the goals and objectives and will include the partners and stakeholders needed for each strategy as well as the steps needed for implementation such as environmental clearance, funding, and maintenance/operations. The consultant should prioritize CAP strategies and measures that are synergistic with projects identified in other City documents as mentioned in Task 1.

Task 3 Deliverable: Mitigation and adaptation strategies memorandum.

TASK 4. DRAFT PLAN

The draft plan should take a long-term approach to climate action while focusing on achievable measures. Climate mitigation and adaptation strategies should be fully developed and incorporated into the plan. Each strategy should include information about agencies and departments responsible for implementation as well as actionable steps, potential partnerships, estimated staffing requirements, and recommended funding sources. The plan should clearly define metrics, prioritize measures, and determine implementation timelines. The plan should recommend management and information system improvements, where appropriate, such as dashboards or scoreboards, to facilitate annual reporting.

The draft plan will be reviewed internally with responsible departments and staff. The project schedule should include adequate time for public comment on the draft plan. Review should include an analysis of the implications of each strategy on the environment, social equity, and the local economy.

Task 4 Deliverable: CAP administrative draft and CAP public draft.

TASK 5. CEQA REVIEW

The City anticipates that the selected consultant will complete the required CEQA review for the CAP update. The City will cover County Clerk filing and California Department of Fish and Wildlife review costs associated with Notice of Determination or Notice of Exemption, whichever is appropriate. The City will also circulate Tribal Consultation Notices per Tribal Cultural Resources (AB 52), if applicable. Consultants should review the RFP and provide their expert opinion on whether the CAP may be eligible for a CEQA Exemption, which should significantly reduce the potential budget.

Task 5 Deliverable: CEQA documents.



TASK 6. PRESENTATIONS TO PLANNING COMMISSION AND CITY COUNCIL

The consultant will support staff in preparing reports and presentations to the Planning Commission and City Council. In addition to presentations of the draft plan to both bodies, staff anticipates a midway check-in to summarize the existing conditions analysis and outline the proposed outreach strategy.

Additionally, the City anticipates forming an internal staff advisory committee to support the development of the CAP. The consultant should be prepared to check-in with this group as needed via email or virtual meetings throughout the planning process.

Task 6 Deliverables: Staff reports, presentations, participation in conference calls/meetings.

TASK 7. FINAL PLAN

The consultant will incorporate comments and findings from staff, Planning Commission, City Council, and the community into the final CAP document.

Task 7 Deliverable: Final Plan

TASK 8. TEXT FOR GENERAL PLAN

Based on the adopted CAP, the consultant will develop draft text to include in a General Plan update that will be completed by City staff at a later date. The language should be concise and work to reference the CAP rather than result in the need for a new General Plan Element or significant update.

Task 8 Deliverable: Draft text for the General Plan.

TASK 9. PROJECT MANAGEMENT

This task will include an initiation of the project, a confirmation of the schedule and contract or contracts, and a mutual understanding of the project direction. The kick-off meeting will provide an opportunity for all team members to finalize the schedule and work scope, discuss data collection and document review, and confirm communication protocols. This task also will include progress reports and invoicing as well as coordination calls with staff to discuss project direction, progress, and deliverables.

Task 9 Deliverables: Meetings, conference calls, progress reports, invoicing.



IV. Minimum Qualifications

The consultant should have substantial experience in the areas of climate mitigation and adaptation planning, vulnerability analysis, and community engagement.

The consultant team should include personnel knowledgeable in their areas of expertise. The City reserves the right to perform investigations as may be deemed necessary to insure competent persons will be utilized in the performance of the contemplated services.

More than one proposal from an individual, firm, partnership, corporation, or association, under the same or different names, will not be considered. Responses submitted after the due date and time will not be accepted.

The consultant is responsible for determining whether its services under the proposed Agreement, or its services rendered for any task assigned to it pursuant to the Agreement, requires the payment of prevailing wages to its agents, employees, and contractors for work related to that task.

V. Submittal Requirements

Interested parties are invited to respond by providing the information requested in this RFP. Responses should demonstrate the consultant's qualifications, experience, and understanding of the project requested and describe the consultant's ability to deliver a quality project on time. At a minimum, the responses shall comply with the General Conditions in section IX and provide the following:

1. **Team Profile.** Provide the consultant's company and proposed project team information as follows:
 - a. Office Location(s)
 - b. Licensed professionals
 - c. Project manager and key individuals who will be assigned to the project:
 - i. Resumes
 - ii. Statements of experience
 - d. List of proposed sub-consultants, identifying their area of work and including their qualifications.
 - e. List of board members, partners, and any other relevant team members and their related experience.



2. **Comparable Consulting Experience.** Provide information about previous consulting experience related to climate action planning, vulnerability analysis, community engagement, etc. Information shall include:
 - a. Name, location, and characteristics of projects.
 - b. History in performing work required and bringing projects within scope of work, schedule, and budget. Include original budget and final cost of project.
 - c. Date and duration of any similar projects.
 - d. Description of important features of similar projects.
3. **Project Proposal.** Provide a proposed approach and projected timeline to conduct and complete the steps in the scope of work. Briefly describe the methodology and organizational approach the consultant would use to assist the City, including critical elements and special methodologies that would be used to ensure that City objectives are satisfied. Provide estimated hours and costs associated with each of the scoped tasks and summarize in a cost proposal. Some tasks/subtasks are considered mandatory and listed as such under each Tasks, while others may be considered as optional in order to produce an RFP within the City's Not to Exceed amount for this project. In order to receive a favorable review, consultants should seek to satisfy all mandatory tasks/subtasks while producing creative optional tasks/subtasks in order to provide a proposal that meets the Not to Exceed amount of \$100,000.
4. **Conflicts of Interest.** Disclose any actual, apparent, direct or indirect, or potential conflicts of interest that may exist with respect to the firm, management, or employees of the firm or other persons relative to the services to be provided under the Agreement to be awarded pursuant to this RFP. If the consultant has no conflicts of interests, a statement to that effect shall be included in the Proposal.
5. **Acknowledgements.** Acknowledge the consultant has reviewed the General Conditions in section IX and agrees the proposal shall remain open for a minimum of 150 calendar days from the Submittal Deadline.

Proposals shall be submitted electronically via email attachment, Dropbox link, CD, or USB drive to Ken Strelow, Planning Manager at: strelow@ci.oakley.ca.us. USBs shall be mailed to Attn: Ken Strelow, Planning Manager, City of Oakley, 3231 Main Street, Oakley, CA 94561, Attn: RFP Oakley CAP.

Proposal shall be received on or before 5 p.m. on February 7, 2024.



VI. Selection Process/Criteria

In soliciting proposals, it is the intent of the City to have the best possible product. The City reserves the right to act as the sole judge of the content of all responses. In addition, the City reserves the right to reject any or all submissions, and to waive irregularities in the selection procedures.

The City shall establish a selection committee in its sole discretion. The selection committee shall conduct an initial review of each submission to ensure they are timely and meet the minimum standards for consideration. The selection committee will then evaluate the qualified submission to identify the best consultants as finalists. The City will not discriminate against any interested firm or individual on the grounds of race, gender, sexual orientation, age, disability, or national origin in the contract award.

1. **Initial Review.** After the submission deadline, the selection committee will perform an initial review of the responses to ensure they comply with the requirements of the RFP for submittal and consideration.
2. **Qualifications/Proposal Review.** The selection committee will then consider the proposal and qualifications of the complete submissions. Consideration will be given based on, but not limited to:
 - a. Familiarity with all aspects of the requested project;
 - b. Experience of consultant's proposed project manager and key individuals on similar projects;
 - c. Staff availability, stability, past performance on similar projects, as well as qualifications and past performance of consultant's key personnel;
 - d. No personal or organizational conflicts of interest;
 - e. References from other entities similar to the City of Oakley;
 - f. Ability to meet the service criteria specified;
 - g. Possession of and ability to retain qualified personnel, possession of licenses and certifications.
3. **Interviews/Discussions.** The selection committee may then request the finalists to make an oral presentation as part of the selection process. Interviews and presentations may be remote or virtual and the City can accommodate either at the request of each finalist. Presentations are to be conducted by the consultant's proposed Project Manager for this project. Regardless of whether a presentation is requested, the selection committee may conduct discussions with a finalist for the purpose of clarification to assure full understanding of, and conformance to, the RFP.



4. **Recommendation.** The selection committee shall then recommend the top consultant to the Community Development Department (CDD) Director.

VII. Confidentiality and Non-Disclosure

The City of Oakley recognizes that the submissions may include proprietary or confidential information. The City will take every reasonable precaution in protecting such information provided that it is clearly identified as proprietary or confidential on the page on which it appears. However, the City is subject to the California Public Records Act and must disclose records as required by the Act.

Information submitted as a part of this RFP will not be returned. The City reserves the right to reject any and all submissions.

VIII. Exhibits

The following exhibits are included with this RFP via hyperlink and direct url:

- [City of Oakley General Plan Focused General Plan Update \(Adopted January 11, 2022\)](https://www.ci.oakley.ca.us/wp-content/uploads/2022/07/Oakley-General-Plan_Adopted-2022-01-11.pdf) (https://www.ci.oakley.ca.us/wp-content/uploads/2022/07/Oakley-General-Plan_Adopted-2022-01-11.pdf)
- [Oakley 2010 Community-Wide & Local Government Operations Greenhouse Gas Emission Update](http://www.ci.oakley.ca.us/wp-content/uploads/2018/10/Oakley-LGO-Community-Update-2010.pdf) (<http://www.ci.oakley.ca.us/wp-content/uploads/2018/10/Oakley-LGO-Community-Update-2010.pdf>)
- [City of Oakley Strategic Plan 2022-2027+](https://www.ci.oakley.ca.us/wp-content/uploads/2022/05/Oakley_SP_final.pdf) (Adopted April 2022) (https://www.ci.oakley.ca.us/wp-content/uploads/2022/05/Oakley_SP_final.pdf)
- [City of Oakley Economic Development Work Plan 2023-2026](https://www.ci.oakley.ca.us/wp-content/uploads/2023/10/City-of-Oakley-2023-Work-Plan-Final-09-13-23-1.pdf) (<https://www.ci.oakley.ca.us/wp-content/uploads/2023/10/City-of-Oakley-2023-Work-Plan-Final-09-13-23-1.pdf>)
- [Oakley Strategic Energy Plan \(Fall 2015\)](http://www.ci.oakley.ca.us/wp-content/uploads/2015/09/Oakley-SEP-FINAL-Version.pdf) (<http://www.ci.oakley.ca.us/wp-content/uploads/2015/09/Oakley-SEP-FINAL-Version.pdf>)
- [Contra Costa County Local Hazard Mitigation Plan](https://www.contracosta.ca.gov/6842/Local-Hazard-Mitigation-Plan) (<https://www.contracosta.ca.gov/6842/Local-Hazard-Mitigation-Plan>)



IX. General Conditions

1. This RFP does not commit the City of Oakley to execute an agreement. The City reserves the right to accept or reject any or all submissions if the City determines it is in the best interest of the City to do so.
2. Submissions shall remain open, valid, and subject to acceptance anytime within one hundred fifty (150) calendar days after the proposal due date and up to the end of the agreement period.
3. Submissions shall not be withdrawn or corrected after being opened. The City will not be responsible for errors or omissions on the part of consultants in preparing their submissions.
4. The City reserves the right to issue addenda or amendments to this RFP.
5. In order to be considered, all submissions must be submitted in the manner set forth in this RFP. It is the respondent's responsibility to ensure that its submission arrives before the specified Submittal Deadline.
6. This RFP does not commit the City to pay any costs incurred in the preparation of a submission in response to this request and consultant agrees that all costs incurred in developing this submission are the consultant's responsibility.
7. The City reserves the right to award an agreement at this time for all or only some of the services requested.

X. Project Administration

All communications related to this RFP shall be directed to Ken Strelo, Planning Manager in the Community Development Department of the City of Oakley prior to submission. All questions relating to interpretation of the RFP must be submitted via email at least 7 calendar days prior to the submission date and responses will be in the form of written addenda to the Documents posted on the City website. Questions submitted after this time period may not be answered.

Ken Strelo, Planning Manager
City of Oakley
3231 Main Street
Oakley, CA 94561
Phone: (925) 625-7036
Email: strelo@ci.oakley.ca.us



XI. Waiver

By submitting a response to this RFP, each respondent expressly waives any and all rights that it may have to object to, protest or seek legal remedies whatsoever regarding any aspect of this request, the City's selection of the top proposal, the City's rejection of any or all responses, and any subsequent agreement that might be entered into as a result of this request.

