



The City of Costa Mesa, California

June 1, 2004

RE: **Corporate Partnerships and Program Sponsorships Plan and/or Skatepark Sponsorship Program**

Request for Proposals

Dear Proposers:

The City of Costa Mesa is requesting proposals for consulting and agent services to analyze, make recommendations and develop Portfolio of Corporate Partnerships and Program Sponsorships. The intent of this RFP is to enhance existing or create new revenue streams to pay for city services and/or to develop and secure Corporate Partnerships and Program Sponsorships specifically for the City of Costa Mesa's first Permanent Skatepark.

To be considered responsive, offerors must bid in accordance with the requirements, specifications, commercial terms, and provisions as described and set forth herein. Proposals must embrace a concept that the successful offeror will satisfy all of the objectives and work requirements specified in the Request for Proposal Scope of Work.

PROPOSALS ARE DUE BY 4:00PM. FRIDAY JUNE 25, 2004

After the proposal due date, evaluation and proposal clarification will commence. The City may require offerors found most responsive/responsible to make presentations. Presentations are scheduled for June 28 and 29. **ONLY THOSE PROPOSERS FOUND MOST RESPONSIVE/RESPONSIBLE WILL BE INTERVIEWED.**

Thank you for your interest and good luck.

Respectfully,

Jana M. Ransom
Recreation Manager

City of Costa Mesa Corporate Partnerships and Program Sponsorships Plan and/or Skatepark Sponsorship Program

The City of Costa Mesa is requesting proposals from qualified consultants to research, analyze, develop, recommend and implement Corporate Partnership and Sponsorship Programs in order to enhance or create new revenue streams to pay for city services. Separately, the City is also considering proposals from qualified consultants to develop and secure Corporate Partnerships and Sponsors for the City's first permanent Skatepark. This element may be submitted separately or jointly with an Corporate Partnership and Sponsorship Programs Plan.

To be considered responsive, offerors must bid in accordance with the requirements, specifications, commercial terms, and provisions as described and set forth herein. Proposals must embrace a concept that the successful offeror will satisfy all of the objectives and work requirements specified in the Request for Proposal Scope of Work. This Request for Proposal is set out in the following format:

- Section I:** *Introduction and Instruction to Offerors*

- Section II:** *Offerors Proposal Response Requirements*

- Section III:** *Scope of Work*

- Section VI:** *Appendices*
 - Appendix 1 City Information*
 - Appendix 2 Sample Professional Services Agreement*

CLOSING TIME AND DATE: PROPOSALS ARE DUE BY 4:00 P.M. FRIDAY, JUNE 25, 2004

Proposals received after 4p.m. Friday, June 25, 2004 will **NOT** be considered. One original (marked original) and four (4) copies (marked copy) of the Proposal must be submitted in a sealed envelope marked RFP 062504REC and submitted to the following address:

Delivery Address: City Clerk City of Costa Mesa 77 Fair Drive, Room 101 Costa Mesa, CA 92626	Mailing Address: City Clerk City of Costa Mesa P.O. Box 1200 Costa Mesa, CA 92628-1200
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Information may be obtained by contacting Jana Ransom, Recreation Manager at (714) 754-5654.

Opening:

Please note there will be no public opening of proposals. Prices and other proposal information shall not be made public until the proposal is awarded. At that time, the executed contract will become public information.

Proposals must be valid for a period of ninety (90) days from the due date. Proposals may **NOT** be withdrawn after the submission date.

SECTION I

City of Costa Mesa Corporate Partnerships and Program Sponsorships Plan and/or Skatepark Sponsorship Program

Introduction and Instructions to Offerors

A. Introduction

The City of Costa Mesa is requesting proposals from qualified consultants to research, analyze, develop, recommend and implement Corporate Partnership and Sponsorship Programs in order to enhance or create new revenue streams to pay for city services. Separately, the City is also considering proposals from qualified consultants to develop and secure Corporate Partnerships and Sponsors for the City's first permanent Skatepark. This element may be submitted separately or jointly with a Corporate Partnership and Sponsorship Programs Plan. It is anticipated that the scope of services will be contracted for in four phases: First, the Skatepark Sponsorship Plan and then a three phased Corporate Partnership and Sponsorship Programs Plan.

For the Corporate Partnerships and Program Sponsorships Plan, the city first wishes to determine the feasibility of corporate partnerships and sponsorship programs on a cost/benefit ratio before it proceeds with such programs. The goal of the city is to develop a Corporate Partnership and Program Sponsorship portfolio that would provide substantial net revenue for the city to use for facilities, programs, and services. **If the estimated costs of such programs outweigh the projected net income, the city will end the process after the feasibility study.** (Phase 1 – Feasibility Study)

Should the City determine from Phase 1 Feasibility Study to proceed, Phase 2 would be the development of agreements, benefit packages, City resolutions, approval processes and implementation strategies.

The third phase would be to prepare Request for Proposals on behalf of the City and solicit proposals from potential partners and sponsors identified in Phase 2. It also includes negotiating concession agreements, licenses and leases to present to City Council for approval. Consultant shall attend City Council and/or other meetings required for the approval process.

B: Proposed Time Schedule

RFP Mailing: June 3, 2004
Proposals due: 4:00 p.m., June 25, 2004 to Costa Mesa City Clerk
Interviews: July 7 and 8, 2004
Final Selection: July 14, 2004
Consultant Contract Awarded by City Council: July 19, 2004 (est.)
Contract Effective date: August 15, 2004

C. Instructions to Offerors and Procedures for Submittal

Proposal must be tabbed and indexed in accordance with the information requested in Section II. **It is imperative that all offerors responding to this RFP comply exactly and completely with the instructions set for herein.**

1. All proposals shall be submitted on standard 8.5" by 11" paper in hard-covered binders. All pages should be numbered, tabbed and identified sequentially by section.
2. Offerors' **proposal must be accompanied by a cover letter** with an affixed signature of an individual authorized to bind the proposing entity.
3. All questions, interpretations, or clarifications desired shall be requested in writing by **June 16, 2004**. Oral statement(s) concerning meaning or intent of the contents of this RFP by any person are unauthorized and invalid. Inquiries concerning this RFP should be directed to:

Jana Ransom, Recreation Manager
City of Costa Mesa Administrative Services Department
77 Fair Drive
Costa Mesa, CA 92626
Telephone: (714) 754-5654

4. In the event the CITY deems it necessary to make changes to this RFP without changing the intent of the RFP, these changes shall be made in the form of a written addendum authorized and issued only by the City of Costa Mesa Recreation Division.
5. Any information supplied by the CITY pursuant to this RFP shall be kept confidential by the offeror.
6. Offeror must submit its proposal in strict accordance with all requirements of this RFP, and compliance must be stated in the proposal. Deviations, clarifications,

and/or exceptions must be clearly identified and listed separately as alternative items for the CITY consideration. The CITY reserves its right to waive, at its discretion, any procedural irregularity, immaterial defects, or other improprieties which the CITY deems reasonably correctable or otherwise not warranting rejection of the proposal. Any waiver will not excuse a proponent from full compliance if awarded a contract.

Offeror shall also submit a statement giving a complete description of all points wherein services proposed do not comply with the requirements and/or Scope of Work as set forth in this RFP.

7. Response to this RFP must follow the format specified in Section II. Response should be in printed form (except where noted), concise, straightforward, and must fully address each requirement and question.

Offerors Compliance: Offer must provide a paragraph by paragraph response. Responses should be sufficiently detailed to convey the offeror's full understanding of the requirements. Simply stating "will comply," "understood," "acknowledged," or similar verbiage is not considered adequate response.

8. Proposal must be **valid for a period of 90 days** from the due date. Proposal may **NOT** be withdrawn after the submission date.
9. The CITY reserves the right to negotiate with any offeror as necessary to serve the best interests of the CITY and negotiate the final contract with the most responsive, responsible offeror. The CITY reserves the right to waive, at its discretion, any irregularity or informality which the CITY deems correctable or otherwise not warranting rejection of the RFP. CITY reserves the right to reject any and all proposals and to accept any proposal or portion thereof. No obligation, either expressed or implied, exists on the part of the CITY to make an award or to pay any costs incurred in the preparation or submission of a proposal. All costs associated with the preparation or submission of proposals covered by this RFP are solely the responsibility of the offerors.
10. All proposals shall become the property of the CITY; proposals must **NOT** be marked as confidential or proprietary. CITY may refuse to consider a proposal so marked. Information in proposals shall become public information and subject to disclosure laws. CITY reserves its right to make use of any information or ideas in the proposal.
11. CITY reserves its right to reject any and all proposals. No obligation, either expressed or implied, exists on the part of the CITY to make an award or to pay any costs incurred in the preparation or submission of a proposal, or in making necessary studies or designs for the preparation thereof, nor procure or contract for services or supplies. Further, no reimbursable cost may be incurred

in anticipation of award. All costs associated with the preparation or submission of proposals covered by this RFP are solely the responsibility of the offeror.

12. After the proposal due date, evaluation and proposal clarification will commence.

13. CITY may require offerors found most responsive/responsible to make demonstrations during the proposal evaluation process. If presentations are required, offerors shall provide representatives capable of explaining, in detail, the proposed services and addressing all questions. CITY may provide a list of questions to the offerors prior to the presentation/demonstration. In addition to addressing these questions during presentations, offerors shall provide written responses to these questions, as well as any questions raised during the presentation. Response to questions arising from the presentation will be provided to the City of Costa Mesa within four (4) business days following the presentation/demonstration and should be submitted to the address as set forth in Item 4 within.

SECTION II
City of Costa Mesa
Corporate Partnerships and Program Sponsorships
Plan and/or
Skatepark Sponsorship Program

PROPOSAL RESPONSE REQUIREMENTS

Proposal must be concise and with sufficient detail to allow accurate evaluation and comparative analysis. ***Response items must be indexed in the following order with individual tabs:***

A. Cover Letter:

Proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposing entity. An unsigned proposal is grounds for rejection. The cover letter includes an introduction of the firm and the proposal subject(s), the consulting firm's name, local address, telephone number, contact name and telephone number and email address, and the consulting firm's Federal Identification Number and date of submission, as well as a statement of professional qualifications. Cover letter should clearly state if offeror is submitting proposal for Corporate Partnerships and Program Sponsorships Plan alone, Skatepark Sponsorship Program alone or for both elements.

B. Company Data:

Please submit the following information:

1. Official name and address.
2. Indicate what type of entity (corporation, company, joint venture etc). Please enclose a copy of the Joint Venture Agreement if entity is a joint venture.
3. Federal Employer I.D. Number.
4. The address, telephone numbers, email addresses and fax numbers of each of your firm's locations.
5. A detailed statement indicating whether offeror is totally or partially owned by another business organization or individual.
6. A detailed statement indicating whether offeror is totally or partially owned by another business organization that will be providing services, supplies, material or equipment to proponent, or in any manner does business with offeror under this agreement.

7. Number of years offeror has been in business under the present business name.
8. Number of years of experience the offeror has had in providing required, equivalent, or related services.
9. Relevant comparable contracts completed during the last five (5) years. Please indicate:
 - Year
 - Type of Contract
 - Contracting Agency
10. Any failures or refusals to complete a contract and explanation.
11. Financial interests in other lines of business.

C. Resumes and Qualifications of Personnel:

The offeror shall furnish a personnel staffing plan with sufficient information for judging the quality and competence of the personnel dedicated to the account. In its assessment of the proposal, the CITY will place considerable emphasis on the commitment by the offeror to provide qualified personnel for the execution of the contract. The Offeror shall furnish resumes for key personnel committed to this project. Offeror shall also include the number and type of additional support personnel who will be assigned to the project. The substitution or addition of other key individuals shall be allowed only with prior written approval of the CITY.

Resumes shall include:

Name

Classification/Title

Education

Show degrees earned and certifications, school and year of completion. Exclude company courses or information that is not relevant to the person's functional job duties.

Summary of Related Experience

Professional Memberships/Certifications

D: Organizational Chart:

Offeror shall include an organizational chart that reflects titles of key staff and management contacts of each individual assigned to provide services under this contract.

E: References:

Offeror to provide at least three (3) references for whom offeror has provided services of the nature and scope as set forth in the RFP within the last five (5) years. Include name of business or organization, name of contact person, telephone number of contact person, brief description of services provided, and dates for which the services were provided. City reserves the right to contact any and all of the listed references.

F: Overview and Approach:

- **Understanding:** Offeror must include in this section its understanding of developing Corporate Partnerships and Program Sponsorships Plans and/or for developing specific sponsorship or donor programs related to recreational facilities such as skateparks.
- **Approach:** Offeror must include in this section its approach to researching, analyzing, developing, recommending and implementing Corporate Partnership and Sponsorship Programs in order to enhance or create new revenue streams to pay for city services and/or in offsetting costs or enhancing revenue for skateparks and skatepark elements.
- Offeror must reference all corresponding itemized numbers as listed in the **SCOPE OF WORK**. Offeror must note any services NOT provided by their firm. List any subcontractors you are recommending and their costs (note: following award of the contract, no additional subcontracting will be allowed without the express written consent of the City).
- Offeror shall also list any resources, CITY assistance or other items expected to be provided by CITY.
- Offeror may additionally itemize those services which are further required in the servicing of the account but are not noted in the aforementioned paragraphs as requirements. Offeror will entitle this section as ADDITIONAL SERVICES.
- Offeror shall provide a Compensation Schedule to reflect any and all charges the CITY is likely to incur including hourly rates for personnel assigned to this project, materials, equipment supplies and services to be performed by offeror's firm.

Offeror shall provide an estimate of man hours they expect to expend to accomplish each element of the scope of work for either or both proposals.

Offerors must state if the proposed rate is guaranteed for the term of the contract or if it is subject to adjustments. If subject to adjustments, offeror must state the frequency of adjustments and how adjustments are determined.

Include a “not to exceed” project budget that outlines the cost for each step of the process being proposed. Include a proposed budget for the project that shows the estimated number of hours for each personnel assigned to the project.

G: Validity of Proposal:

Offeror shall state the length of time for which proposal shall remain valid. CITY requires a period of at least ninety (90) days.

H: Certificate of Insurance:

Offeror shall demonstrate the willingness and ability to submit proof of the required insurance coverage within 10 days of execution of the contract. (See Appendix 2)

I. Evaluation Criteria:

The most qualified firm to provide the requested services will be selected based on, but not limited to, the following criteria:

1. Experience and qualifications of the firm, particularly of staff assigned to administer this contract.
2. Education and experience of staff members assigned to project, particularly their experience in developing Corporate Partnerships and Program Sponsorships in municipal settings.
3. Demonstrated knowledge of public agencies, particularly municipalities.
4. Availability and commitment of personnel.
5. Responsiveness to the stated objectives and scope of work outlined in this Request for Proposals.
6. Philosophy and approach to scope of work.
7. Understanding of the needs and requirements of CITY.

8. Location of firm and availability of staff assigned to CITY.
9. Quality of references.
10. Proposed costs.
11. Content and form of written proposal.
12. Interview (if any).

Skatepark sponsorship proposals may be submitted jointly or separately and will be selected based upon the following criteria:

1. Specific experience in developing corporate sponsorship packages for Municipal Skateparks.
2. Demonstrated knowledge of public agencies, particularly municipalities
3. Understanding of the needs and requirements of CITY.
4. Quality of references.
5. Proposed costs.
6. Content and form of written proposal.
7. Interview (if any).

The criteria as set forth herein for the evaluation of proposals are in a random sequence and are not considered in any rank order of importance. Based on an evaluation of the proposals using the above criteria, the most qualified firms may be scheduled for interviews with City staff.

SECTION III

City of Costa Mesa Corporate Partnerships and Program Sponsorships Plan and/or Skatepark Sponsorship Program

SCOPE OF WORK

PURPOSE: The City of Costa Mesa (referred to herein as the “CITY”) is seeking professional services proposals from qualified firms (“CONTRACTOR”). The City of Costa Mesa is requesting proposals from qualified consultants to research, analyze, develop, recommend and implement Corporate Partnership and Sponsorship Programs in order to enhance or create new revenue streams to pay for city services.

Separately, the CITY is also considering proposals from qualified consultants to develop and secure Corporate Partnerships and Sponsors for the CITY’s first permanent Skatepark. This element may be submitted separately or jointly with Corporate Partnership and Program Sponsorship Plan. It is anticipated that the scope of services will be contracted for in four phases: First, the Skatepark Sponsorship Plan and then a three phased Corporate Partnership and Sponsorship Programs Plan.

For the **Corporate Partnership and Sponsorship Programs Plan**, the CITY first wishes to determine the feasibility of corporate partnerships and sponsorship programs on a cost/benefit ratio before it proceeds with such programs. The goal of the CITY is to develop a portfolio that would provide substantial net revenue for the city to use for facilities, programs, and services. **If the estimated costs of such programs outweigh the projected net income, the city will end the process after the feasibility study.**

The second phase would be the development of agreements, benefit packages, CITY resolutions, approval processes and implementation strategies, provided the CITY determined from the feasibility study in phase one to proceed.

The third phase would be to prepare Request for Proposals on behalf of the CITY and solicit proposals to potential partners and sponsors identified in phase two. It also includes negotiating on behalf of the CITY concession agreements, licensees and leases to present to City Council for approval. Consultant shall attend City Council and/or other meetings required for the approval process.

Ultimately, the CITY wishes to develop a **Corporate Partnership and Sponsorship Programs Plan** portfolio that would provide a dedicated revenue source for City of Costa Mesa facilities, programs and community services.

In addition to the above broad-based plan, the CITY will entertain separately or jointly proposals for the solicitation of potential partners and sponsors specifically for the permanent skatepark to be located at TeWinkle Park. Proposals should include negotiation on behalf of the CITY of concession agreements and licenses to present to City Council for approval. Consultant shall attend Parks and Recreation Commission meetings, City Council and/or other meetings required for the approval process.

Both the Skatepark Plan and the Corporate Partnerships and Program Sponsorships Plan must be developed with community participation as a central feature. Community input must be representative of the entire community with regards to age, income, ethnicity and demographic location. The creditability of the data collected during the community input process is essential for community buy-in of the final plans.

BACKGROUND: Please see Appendices 1 for background information on CITY and related information.

OBJECTIVES:

- A. The **Skatepark Sponsorship Plan** and the **Corporate Partnerships and Program Sponsorship Plan** must be consistent with the CITY's General Plan and the Parks and Open Space Masterplan. There are a number of general plan objectives that must be included when developing these plans. Consultants should review the CITY's General Plan and the Parks and Open Space Masterplan guidelines, especially with regard to signage, protection of open space, zoning, view impacts, permitting processes and use of public property when developing the partnership and sponsorship packages.
- B. Implementation Strategy – The **Skatepark Sponsorship Plan** and the **Corporate Partnerships and Program Sponsorships Plan** should be developed in a manner that will provide an implementation strategy for turning the recommendations for corporate partnership and sponsorships into reality. The Skatepark Plan and the Corporate Partnerships and Program Sponsorships Plan should address start up costs, phasing, funding/financing, revenue generation, and other relevant economic data to enable city officials to make informed business decisions with regards to the implementation of either the Skatepark Plan or the Corporate Partnerships and Program Sponsorships Plan.

PREPARATION OF THE SKATEPARK SPONSORSHIP PLAN:

1. Prepare Request for Proposals on behalf of the CITY and solicit proposals from potential partners & sponsors, concession operators, licensees and lessees.
2. Provide standard contracts and develop benefit packages for corporate partnership and sponsorship programs.
3. Provide concession agreements, license agreements and/or lease agreements for the partnership/sponsorship alternatives defined in the Skatepark Plan.
4. Attend Parks and Recreation Commission, City Council and/or other meetings required for approval.

PREPARATION OF THE CORPORATE PARTNERSHIPS AND PROGRAM

SPONSORSHIPS PLAN: Development of the Corporate Partnerships and Program Sponsorships Plan will be a joint effort of the community, city staff, and the consulting firm's team. It is the city's desire to utilize staff resources wherever practical to allow the consultant to focus on the essential tasks related to their experience and expertise.

Phase I – Feasibility Study

- A. Prepare a Financial Impact Analysis and Feasibility Study:
 1. Review with staff potential revenue opportunities in the following Corporate Partnership categories: Events, Facilities, Uniforms, Vehicles, Computer Hardware/Software, Landscaping, etc.
 2. Prepare a cost/benefit analysis for those categories that appear to be logistically and politically viable.
 3. Prepare potential corporate partnership pro-formas.
 4. Review with staff and elected officials and selected community leaders the Feasibility Study and provide input into the start up costs, financial impacts of the revenue alternatives and timelines for implementation.
- B. Prepare the Draft Asset Management Portfolio Plan based on the feasibility study and recommendations.
- C. Attend up to two City Council meetings, one workshop and one regular, to present the feasibility study and Draft Asset Management Plan.

Phase II – Approval Process

- A. Prepare a final Corporate Partnerships and Program Sponsorships Plan from the Feasibility Study
- B. Provide standard contracts and develop benefit packages for corporate partnership and sponsorship programs.
- C. Provide concession agreements, license agreements and/or lease agreements for the partnership/sponsorship alternatives defined in Corporate Partnerships and Program Sponsorships Plan
- D. Attend City Council and/or other meetings required for approval.

Phase III - Implementation

- A. On behalf of the City, prepare Request for Proposals and solicit proposals to potential partners and sponsors, concession operators, licensees and lessees.
- B. Negotiate and prepare final agreements for City approval.
- C. Attend City Council and/or other meetings required for approval of contracts and agreements.

SECTION VI

City of Costa Mesa Corporate Partnerships and Program Sponsorships Plan and/or Skatepark Sponsorship Program Appendices

APPENDIX 1 City Information

According to the City's General Plan, Costa Mesa in 1953 was 3.5 square miles in size and home to 16,840 residents. Today, the City is 16 square miles in size and more than 110,000 live within its boundaries. In 1909, the City's business component consisted of one general store that stood on the corner of Newport and 18th streets. Today, Costa Mesa is not only a vital commercial and industrial center, but also hosts the world-class Orange County Performing Arts Center, three colleges, and the county fairgrounds. Its many residential neighborhoods, significant open space areas, and recreation facilities complement commercial, institutional, and cultural uses to form an interesting, dynamic, prosperous City on the world stage.

Costa Mesa borders with the cities of Huntington Beach, Fountain Valley, Santa Ana, Irvine, and Newport Beach. The Santa Ana River forms its western boundary and is an important circulation, open space, and recreation element for Costa Mesa. The Pacific Ocean and the Upper Newport Bay and Ecological Reserve are just outside Costa Mesa's southern and eastern borders and are also important to residents in terms of recreation. Three freeways cross the City, at once providing access through the City and beyond and also creating barriers that shape neighborhoods internally.

Costa Mesa is a mature City nearing build out capacity. Costa Mesa's population is expected to increase from the 2002 estimate of 110,720 to 122,200 by 2025. The City has been characterized by a below average proportion of families and families with children, however, there is some indication that there will be growth in this sector, as household sizes increase. The City has a growing Hispanic population.

In 2003, City Council voted to fund the City's first skatepark at TeWinkle Park, to be located in a grassy meadow area on the on the southeast corner of Arlington and Junipero. In March of 2004, the City's Parks and Recreation Commission approved the concept plan and environmental documentation for the project. Final design for the 15,000 square foot skating facility is expected to be completed in June, 2004, with construction to follow shortly thereafter.

To View the Sample Standard Professional Services Agreement included in this RFP, please go to the Recreation Division, 3rd Floor City Hall, 77 Fair Drive.