

CITY OF STOCKTON

REQUEST FOR PROPOSALS

COMMUNITY INTEREST ASSESSMENT & STRATEGIC
INVESTMENT PLAN CONSULTANT SERVICES



INTRODUCTION

In April 2017, City of Stockton citizens voted to approve the Strong Communities Initiative (“Measure M”) to be used by the City to restore and enhance library and recreation services, and facilities. In May 2016, Staff demonstrated that the City of Stockton had fewer library and recreation programs and facilities per capita when compared to other cities in California of a similar[KF1] size. As a result, Council approved a ballot measure proposing a dedicated one-quarter (1/4) cent special sales and use transaction tax, which was approved by citizens by a two-thirds majority vote. The resulting ordinance allows for the special sales tax to sunset in 2033, unless renewed again by voters.

The City of Stockton is requesting proposals from qualified firms (“Consultant”) to support the Department in the development of (1) a Community Interest Assessment that will evaluate Stockton’s libraries and recreation programs, facilities, and other services provided to Stockton residents through the Community Services Department (“CSD” or “Department”), and (2) a Strategic Investment Plan through 2033 that will support decision-making for future programs, services and capital investments using revenue generated from the Measure M sales tax initiative. This work will be centered on a robust and authentic community engagement process.

The City reserves the right to award contracts to multiple consultants or consultant teams across one or more components of the Scope of Services. Proposers may submit as a single firm, joint venture, or team of specialized subconsultants.

The City recognizes that the core components of this project—community engagement, technical assessment, and strategic planning—require distinct areas of expertise. As such, the City may elect to contract with multiple qualified vendors to ensure each component is delivered with a high level of proficiency.

This Request for Proposal (“RFP”) describes the project, required scope of services, consultant selection process, the minimum information that must be included in the proposal, and submission processes. By responding to this RFP, the consultant agrees to read and understand all information contained within this entire Proposal package.



PROJECT BACKGROUND

The implementation of Measure M created a dedicated one-quarter (1/4) cent sales tax funding source beginning April 2017. Originally, Measure M was projected to generate an estimated \$9.4 million to \$11.8 million per year to support the Community Services Department. However, Measure M revenues have surpassed original estimates and are averaging around \$12 million per year. The sales tax will be in effect until April 1, 2033. Strong Communities funds are restricted and kept in a separate fund. The Strong Communities Advisory Committee serves as a Citizen's Advisory Board whose purpose is to annually review revenues and expenditures from the Strong Communities Fund.

Measure M provides funding to be used to enhance library and recreation services, including safe spaces, after-school programs for children and teens, and expanded days and hours that community centers and libraries can be open. During open service hours, library and recreation facilities provide homework help centers; Science, Technology, Engineering, Math and Arts (STEAM) education; story times; access to literacy services; cultural and sports programs; and a variety of classes. Measure M funding has been used to preserve and expand library and recreation programs, re-open and upgrade facilities, enhance services and collections, and extend services to under-served areas of the City.

Measure M funds are also being used for capital improvement projects to expand or improve library and recreation facilities. As of December 31, 2023, City Council has approved capital appropriations totaling \$39,414,500.



QUALIFICATIONS OF APPLICANTS

Qualified organizations will have demonstrated experience and expertise in:

- Effective community engagement, specifically with groups diverse across race and ethnicity, language, socio-economic status, sexual orientation, gender presentation, age, etc.
- Managing, facilitating, and collaborating with diverse groups of stakeholders (i.e., government, parents, community-based organizations, youth, etc.).
- Working in and with diverse communities and with non-English speaking communities.
- Knowledge of the Stockton community and local services.
- Conducting neighborhood-level and city-wide Community Interest Assessments and asset mapping and leading input processes such as listening sessions, focus groups, key informant interviews, community forums, questionnaire, and survey sampling, and/or other community engagement methods.
- Familiarity with investment planning for public resources (including identification of policy opportunities and constraints in funding) and familiarity with other key City departments, initiatives, and partnerships.
- Developing strategic plans, accessing, and analyzing existing data sources, and conducting and incorporating research and analysis.
- Experience working with youth in strategic planning processes.

Applicants are allowed to include subcontractors as appropriate for specific activities associated with the four elements described in the Scope of Services (i.e., community engagement, Community Interest Assessment, Strategic Plan, and/or project management).

Proposers should clearly identify the specific components of the Scope of Services for which they are best qualified. If proposing as a team, applicants must clearly define roles and responsibilities for each firm and demonstrate how the team collectively provides comprehensive expertise across community engagement, technical analysis, and strategic planning.



SCOPE OF SERVICES

In addition to the Community Interest Assessment and Strategic Investment Plan, the consultant will be responsible for community engagement and ongoing project management. These services shall begin once the contract is initiated.

These four elements are described in depth, below.

The City anticipates that successful delivery of this project may require specialized expertise across multiple disciplines. Proposers may respond to all components of the Scope of Services or identify specific components for which they are best qualified. The City reserves the right to assign different components of the work to different consultants or teams.

All deliverables must meet a professional standard suitable for presentation to City leadership, advisory bodies, and the public. Deliverables should be clear, data-informed, visually accessible, and structured to support decision-making. The City reserves the right to require revisions to ensure deliverables meet quality and usability expectations.

Community Engagement

Community engagement is essential to the development of the Community Interest Assessment and Strategic Investment Plan. The community engagement facilitators associated with the consultant should have the qualifications and competency to successfully engage diverse populations throughout the planning process and the consultant should use the information and learnings collected from the community to directly inform reports and recommendations. Community engagement should include a variety of voices and stakeholders, be accessible to all community members, and emphasize the participation of Stockton's most structurally marginalized residents. The consultant should incorporate non-traditional methods of both information gathering and communicating results back out to the community and stakeholders. All community engagement and outreach will be done in collaboration with the Department, the Strong Communities Advisory Committee, and other key stakeholders.

Potential Activities:

- Collaborate with City staff and existing entities, which may include: Friends of the Library, Parks and Recreation Commission, Senior Center Advisory Board, and the Strong Communities Advisory Committee to develop and implement a plan for community engagement.
- Lead community engagement opportunities to solicit feedback from the public, including, but not limited to: Facilitating focus groups, conducting informational and key stakeholder interviews and surveys using various multilingual collection methods, and leading community forums.
- Create, distribute, collect, and analyze questionnaires; develop sampling methods and protocols; and prepare analyses and reports.
- Communicate to the public and prepare and disseminate findings after community engagement activities.
- Adjust outreach methods according to community feedback whenever possible and appropriate; encourage community participation through incentives (within the constraints of the use of public funds) and partnerships with community-based organizations that may host outreach and engagement events.
- Ensure that all community engagement outreach, activities, and follow-up materials are accessible and inclusive, which includes but is not limited to:
 - Full participation is accessible and encouraged.
 - Materials are available in languages that represent the population including English, Spanish, and Tagalog; and are accessible to a wide array of literacy abilities; and
 - Events address participants' needs such as childcare, transportation barriers, and physical and ADA accommodations.

Suggested Deliverables:

- Develop and implement targeted outreach strategies designed to achieve representative participation across key demographic groups and geographic areas of the City.
- A written community engagement plan.
- Facilitating engagement sessions creating/providing all necessary materials for key stakeholders, community residents (including youth and their families), and policymaker participants.
- Questionnaires and analyses.
- Summaries, analyses, syntheses, and/or visual reports of the lessons learned (quantitative and qualitative) through community engagement activities to share with staff and community residents and participants.
- Materials for conducting outreach, disseminating learnings, and following up with the community through social media and/or other relevant community information channels.

SCOPE OF SERVICES (CONTINUED)

Community Interest Assessment & Report

The Department understands a Community Interest Assessment to be a systematic process for determining and addressing needs, or “gaps,” between current conditions and the desired conditions, including a synthesis of local context that shapes community health and well-being. The Department is seeking a consultant to support this process in determining the needs of recreation and library facilities, programs, and services of Stockton, through an evaluation of existing infrastructure and services to determine how the needs of the community are being met. The consultant should also identify the barriers that prevent residents from accessing the services they need and understand any gaps in services. The needs assessment should identify areas and priorities for improvement. The Department will share preliminary data collected to date, so that the consultant can support, refine, and advance the Community Interest Assessment.

Information should be analyzed and synthesized into relevant sub-groups, such as common characteristics by age and/or geographic area.

The assessment and report should be presented in a narrative and visually appealing format that is accessible and digestible by a variety of stakeholders and community members.

The consultant must demonstrate the ability to produce analytically rigorous, data-driven findings that translate into clear, actionable insights for decision-making.

Potential Activities:

- Identify a framework(s) for the Community Interest Assessment in consultation with Department staff.
- Identify an asset-based community mapping framework(s) in consultation with Department staff and relevant stakeholders.
- Utilize existing information, data, community feedback, and other efforts to date to hone in and tailor additional efforts.
- Ensure all Community Interest Assessment activities, protocols, and processes are aligned with the community engagement plans and inclusivity requirements.
- Present findings and reports to City staff, Commissions, and City Council as needed.

Suggested Deliverables:

- A report and presentation that includes a summary of findings relevant to service needs, priority populations, and effective strategies for achieving outcomes.
- Visual representations of community needs, gaps in services, barriers, strengths, values, and assets (such as a geographic map, relationship matrix, etc.).

Strategic Investment Plan

The consultant will apply data and findings from the community interest assessment to prepare a strategic investment plan for unallocated Measure M revenue. The Strategic Investment Plan will provide a framework for the selection of facilities, facility improvements, programs, and activities through the remaining life of Measure M. The Strategic Investment Plan should make both broad recommendations for use-of-funds and recommendations for specific program initiatives that address the needs and gaps relative to each identified strategy, including priority population(s), and how each initiative is aligned to long-term positive outcomes.

The Strategic Investment Plan should be explicit in its intended impact and alignment with leading initiatives underway in Stockton and San Joaquin County, and in alignment with the intended purpose, goals, and outcomes defined in the Measure M ordinance.

The Strategic Investment Plan will be made available for public comment before finalization. The lead consultant may present the development of the plan and final product to the Strong Communities Advisory Committee and community members and may present the plan to Stockton City Council for adoption.

The approved Strategic Investment Plan will be used by the department to update the Strong Communities Expenditure Plan which will then be integrated into the council-approved annual budget process.

SCOPE OF SERVICES (CONTINUED)

Potential Activities:

- Identify and incorporate decision-making and strategy development framework(s), such as Results-Based Accountability (RBA).
- Develop prioritized funding strategies/themes and impact/outcomes aligned to the Community Interest Assessment.
- Develop a draft Strategic Investment Plan through 2033, conduct a technical review of the draft, and facilitate public input and feedback on the draft to make revisions.
- Ensure synergy between the Strategic Investment Plan and City of Stockton's policy frameworks: Envision Stockton 2040 General Plan, Strong Communities Advisory Committee Annual Report – FY 2022-2023. Present Strategic Investment Plan to the Strong Communities Advisory Committee for approval.
- Present the final Strategic Investment Plan to the City Council for adoption.

Suggested Deliverables:

- Written Strategic Investment Plan that defines goals, expected outcomes, performance objectives, performance measures, and funding allocations.
- Presentation materials relevant to the Committee and the City Council when presenting Strategic Investment Plan for approval and adoption, such as PowerPoint, executive summaries, and agenda reports.

Ongoing Project Management

To support the ongoing work associated with the Community Interest Assessment and Strategic Investment Plan, the consultant will lead project management and communications with Department staff, including providing regular progress reports. Additionally, the consultant will work closely with Department staff throughout the term of the project, as well as key stakeholders.

Potential Activities:

- Present periodic updates to the Department, Strong Communities Advisory Committee, community, and the City Council.
- Plan and facilitate internal (e.g., Department and Strong Communities Advisory Committee) and external (e.g., community) meetings.

Suggested Deliverables:

- Attend in-person meetings at least monthly, with periodic check-ins via email and/or phone to report progress and discuss upcoming activities.
- Develop handouts, outreach materials, agendas, and presentation materials, ensuring accessibility considerations (language, literacy, etc.).



PROPOSAL REQUIREMENTS

Proposals must be clear, complete, and responsive to the requirements outlined in this Request for Proposal (RFP). The City reserves the right to deem proposals non-responsive if they fail to follow the required format or omit requested information.

Proposals should be organized using the following structure:

Cover Letter

Provide a cover letter signed by an authorized representative of the firm. The letter should include:

- A brief summary of the firm's understanding of the project
- Identification of the primary contact person
- A statement confirming the firm's ability to perform the work within the proposed timeline

Firm Qualifications and Experience

Provide an overview of the firm's qualifications, including:

- Relevant experience performing similar work
- Experience working with public sector agencies and diverse communities
- Description of projects of similar scope and complexity
- Key staff qualifications and roles

If proposing as a team or with subcontractors, clearly identify:

- Each firm's role and responsibilities
- How the team structure ensures comprehensive expertise across all components

Project Approach and Methodology

Describe the proposed approach to completing the Scope of Services, including:

- Methodology for community engagement
- Approach to conducting the Community Interest Assessment
- Approach to developing the Strategic Investment Plan
- Strategies for ensuring data quality, analysis, and actionable recommendations
- Approach to project management and coordination with City staff

Proposers may respond to all components of the Scope of Services or identify specific components for which they are best qualified.

Community Engagement Strategy

Provide a detailed plan for outreach and engagement, including:

- Specific outreach strategies to reach diverse and underrepresented populations
- Methods for achieving meaningful and representative participation
- Proposed engagement activities and tools
- Approach to evaluating outreach effectiveness and participation

Proposals should demonstrate a proven ability to execute outreach strategies that result in measurable participation and actionable input.

Project Team and Staffing Plan

Provide a detailed staffing plan, including:

- Roles and responsibilities of key personnel
- Identification of the project manager and primary point of contact
- Resumes or qualifications of key staff
- Description of how the team will coordinate across different components of the work

Cost Proposal

Proposers must provide a detailed, itemized cost proposal that clearly separates pricing by each major component of the Scope of Services.

At a minimum, cost proposals shall include:

- Community Engagement (Section 1)
- Community Interest Assessment & Report (Section 2)
- Strategic Investment Plan (Section 3)
- Ongoing Project Management (Section 4), if applicable

Each component must be priced independently, with a clear breakdown of:

- Total cost per component
- Key tasks or subtasks (as applicable)
- Associated labor, hours, and rates (or equivalent level of detail)

Proposers submitting for multiple components must provide:

- Individual pricing for each component; and
- A total combined project cost

Proposals that bundle costs without clear delineation between components may be deemed non-responsive.

The City reserves the right to:

- Award contracts for individual components of the Scope of Services;
- Negotiate scope and pricing by component; and
- Select different consultants for different components based on qualifications and cost.

Project Timeline

Provide a proposed project schedule, including:

- Key milestones
- Major deliverables
- Estimated timeline for completion of each component

References

- Provide at least three (3) references from similar projects, including:
- Organization name
- Contact person and title
- Description of services provided

Additional Information (Optional)

Include any additional information the proposer believes would be relevant to the City's evaluation of the proposal.

SUBMISSION INSTRUCTIONS

Proposal Submission

Proposals must be submitted electronically via email.

- Submission Email: thomas.freeman@stocktonca.gov
- Subject Line: "RFP – Community Interest Assessment and Strategic Investment Plan – [Firm Name]"
- Submission Deadline: Friday, May 8, 2026 by 3 pm PST

Proposals received after the deadline may be deemed non-responsive and may not be considered.

Proposals shall be submitted as a single PDF document. The City is not responsible for technical issues related to email delivery. It is the responsibility of the proposer to confirm receipt of their submission.

QUESTIONS AND COMMUNICATIONS

RFP Questions

All questions or requests for clarification regarding this RFP must be submitted in writing via email.

- Contact Person: Thomas Freeman, Program Manager III
- Email: Thomas.freeman@stocktonca.gov
- Phone: (209) 937-7779

Questions must be received by Friday, May 1, 2026. Responses to questions may be shared with all prospective proposers to ensure consistency and fairness in the procurement process.

