

Questions & Responses

SSJID RFP for Strategic Plan Update Services (2023)

April 21, 2023

1	Is the term of the contract for this project May 23, 2023 – September 24, 2023?	The contract term can begin as early as board approval of the contract, which is expected by May 23, 2023, if not sooner. The contract is expected to end with approval of the Strategic Plan by the Board of Directors on September 24, 2023, or shortly thereafter.
2	Do you anticipate conducting only one workshop with the Board of Directors, and will it be virtual or in-person?	<p>During the District’s previous strategic planning effort, the District held an initial workshop with the Board of Directors. However, a Director was appointed to participate in each of the previous strategic planning sessions.</p> <p>The District will require at least one workshop with the Board of Directors but encourages consultants to propose an adequate number of board workshops and/or other sessions with staff necessary to support a successful planning process, based on the Consultant’s previous experience.</p>
3	As the General Manager, do you anticipate meeting weekly with the Project Manager? Will these meetings be virtual or in-person?	The District will defer to the Consultant’s recommendations for the frequency of progress/check-in meetings based on the pace of the planning process, but such meetings should occur monthly at minimum. The preferred format for such meetings is virtual.

4	Under “Core Tasks,” Bullet #5, does “organizing” include scheduling with the District Directors for the process and handling of general logistics for meetings (e.g., location, a/v equipment, any catering), or will these tasks be handled internally?	District staff resources will be provided to manage meeting logistics, in coordination with the Consultant. In-person meetings are expected to be held at the District office in Manteca.
5	Under “Core Tasks,” Bullet #6, does the “draft Strategic Plan Update” refer to a written draft document of the plan for staff review?	Yes.
6	Under “Core Tasks,” Bullet #8, is the presentation on September 24, the only presentation you are anticipating, and will it be virtual or in-person?	<p>The September 24 presentation is anticipated to be a final, in-person presentation to the Board of Directors.</p> <p>The Request for Proposal also includes at least one meeting with the Board of Directors to initiate strategic plan development, and a separate board workshop meeting as discussed in Question 2. Each of these meetings will require some form of in-person presentation.</p>
7	The 2017-2021 Strategic Plan had six (6) areas of focus with goals for each. Do you see that this next five-year plan will be an update or a wholesale revisit?	The six areas of focus are general enough to include SSJID’s current business functions, services, and interests. The District does not anticipate a wholesale change to the categories but welcomes consideration of current information and opportunities since the previous plan, an update to the goals and priorities within those focus areas, and prioritization of the focus areas themselves.
8	Is the management letter the “final comments” section as described on Page 14 of the 2017-21 Plan, or is it intended to be an implementation plan?	The Management Letter is intended to document implementation projects identified in the planning process, as well as other strategies the Consultant may recommend for plan implementation based on the Consultant’s overall experience working with the District.

9	Final Report – Will the Consultant be responsible for the final preparation and coordination or printing of the final plan?	<p>The Request for Proposal requires the Consultant to prepare the final report, including the necessary text, charts, and graphics to document the final strategic plan.</p> <p>Additional design and publishing/printing services may be included depending on the capabilities of the Consultant, but it is not required.</p>
10	Regarding the insurance requirements in the sample agreement provided, since the development of a strategic plan is not a construction project, will the District consider lower levels of coverage for General Liability and a waiver for automobile liability insurance from consultant?	<p>The District will consider lowering levels of coverage for General Liability and also consider a waiver for automotive liability coverage.</p>
11	Is there a budget range for this project?	<p>Consultants will propose a budget based on Consultant’s recommended scope of work. The District asks that Consultants prepare a cost-effective proposal considerate of the District’s limited staffing and financial resources.</p>