

# **North Whidbey Fire and Rescue**

770 NE Midway Blvd,  
Oak Harbor, WA 98277

## **REQUEST FOR PROPOSAL (RFP)**

### **Strategic Planning**

#### **RFP Issue Date**

**November 18, 2024**

#### **RFP Documents**

This project is a formal competitive procurement open to all qualified companies. All solicitation documents, including any addenda, are published on our website at <https://www.nwfr.org>

#### **Proposal Due Date**

**5:00 p.m. PST on January 7, 2025**

#### **Proposal Acceptance Location**

##### **Proposals will be received by:**

North Whidbey Fire and Rescue Headquarters

C/O Strategic RFP

770 NE Midway Blvd

Oak Harbor, WA 98277

Office Hours: 8 am-5 pm Monday through Friday

Email: [natasha@nwfr.org](mailto:natasha@nwfr.org)

*North Whidbey Fire and Rescue reserves the right to reject any and all Proposals, cancel this solicitation, and waive any informalities or irregularities in procedure.*

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## **SECTION 1**

### **INTRODUCTION**

North Whidbey Fire and Rescue (NWFR) (Island County Fire District 2) is accepting proposals from qualified consultants (“Proposers”) to research, write, and produce a Strategic Plan for the District.

The Strategic Plan is intended to guide the District by (a) reviewing current conditions with an analysis of existing strengths, weaknesses, opportunities, and threats (SWOT) or Challenges, Opportunities, Weaknesses, and Strengths (COWS); (b) suggesting organizational improvements over five (5) years, (c) establishing realistic strategic initiatives; (d) reviewing the district’s existing mission statement, vision, and values; (e) engaging the community and collecting both internal and external stakeholder input including labor, management, staff and the Board of Fire Commissioners as part of the planning process; (f) developing draft and final versions of the Strategic Plan; (g) presenting the final Strategic Plan to the Board of Fire Commissioners.

The NWFR is an independent Washington special district that provides fire and emergency medical services to a portion of the unincorporated area of Island County. The district currently operates seven (7) fire stations. The district encompasses approximately 55 square miles and serves an estimated population of 20,000 people. The district provides fire suppression, emergency medical, technical rescue, fire prevention/community risk reduction, and public education services to a predominantly rural community.

## **SECTION 2**

### **2.1 PROPOSAL SUBMISSION**

Release Request for Proposal: November 18, 2024

Deadline for Proposer Questions: November 29, 2024, at 5:00 PM PDT

Proposals Due: January 7, 2024, at 5:00 PM PDT

Awarding of Proposal: January 14, 2025

Awarded company start: February 2025

Board of Fire Commissioners Presentation June 2025 (target date)

The district will endeavor to administer the proposal process per the terms and dates outlined; however, the district reserves the right to modify the activities, timeline, or any other aspect of the process at any time, as deemed necessary.

### **2.2 RFP and Attachments**

This Request for Proposal (“RFP”) is available on the district’s website at [www.NWFR.org](http://www.NWFR.org). The proposer is responsible for checking the website for any addendums that may be issued prior to the proposal's due date.

### **2.3 Inquires**

All inquiries related to this RFP are to be directed, in writing, to Fire Chief Swiger, [Chiefswiger@nwfr.org](mailto:Chiefswiger@nwfr.org). **All inquiries must be received by 5:00 PM PDT, Friday, November 29th, 2024.** Inquiries will be answered via e-mail. Information obtained from any other source is not official and should not be relied upon by Proposers.

### **2.4 Submission**

Submit one signed original, three (3) copies, and an electronic proposal version. Mark the original "MASTER COPY". If discrepancies between two or more copies of the proposal are noted, the Master Copy shall be used as the basis for resolving any discrepancies. All proposals, whether accepted or rejected, shall become the district's property upon submission.

**Proposals must be received by 5:00 PM Pacific Daylight Time on January 7, 2025.**

Proposals received after this time and date will not be considered.

Mail your proposals to:

North Whidbey Fire and Rescue

C/O Strategic RFP

770 NE Midway

Oak Harbor, WA 98277

Email: [natasha@nwfr.org](mailto:natasha@nwfr.org)

## **SECTION 3**

### **SCOPE OF SERVICES**

#### **3.1 Services to be Provided**

1. Complete a Strategic Plan for the District to include, but not limited to, the following (collectively, "Scope of Services"): a. Review current conditions with an analysis of existing strengths, weaknesses, opportunities, and threats (SWOT) or Challenges, Opportunities, Weaknesses, and Strengths (COWS).

b. Suggest strategic initiatives over a five (5) year timeframe.

c. Evaluate and/or develop the district's Mission, Vision, and Value statements by facilitating discussion to reach a consensus on key internal standards that create moral and practical guidelines for the organization.

d. Engage the community and collect both internal and external stakeholder input, including labor, management, staff, and the Board of Fire Commissioners, as part of the planning process (note: input from the district's firefighters who work shift assignments will require three (3) separate site visits to capture the district's three (3) separate work shifts) or through an internet conference.

- e. Develop draft and final versions of the Strategic Plan
- f. Establish realistic strategic initiatives for the future.
- g. Present the final Strategic Plan to the Board of Fire Commissioners at a designated meeting.

## **SECTION 4**

### **RFP PROCEDURES**

#### **4.1 Evaluation of Proposals**

The Board of Fire Commissioners will review all proposals submitted. Overall responsiveness to the RFP is an essential factor in the evaluation process. After the proposal review, top-ranking Proposers may be asked to present and demonstrate services and products. Additional information may be requested at that time.

The Board of Fire Commissioners will select the Proposer that best fulfills the district's requirements and represents the best value to the district.

Determination of best value to the district shall be based upon, but not limited to, the following:

1. Qualifications and experience researching and writing Strategic Plans.
2. Performance (quality and efficiency) producing strategic plans for government agencies with services and sizes similar to the district's.
3. Industry knowledge of Strategic Plans.
4. Service availability, ease of process, customer service, and convenience.
5. Proven systems in place for timely communication and follow-up.
6. Ability to provide efficient, user-friendly services and support.
7. Cost.

#### **4.2 Terms of Agreement**

1. The Board of Fire Commissioners will select a Proposer and negotiate a contract and price. If a contract cannot be negotiated for any reason, another Proposer may be selected.
2. Proposers must obtain and maintain insurance policies during the contract terms, as detailed in Attachment A: Insurance Requirements.
3. Proposers that employ any person or persons to fulfill the contract will be required to have a policy of Worker's Compensation Insurance as required by the Labor Code of the State of Washington.
4. The successful Proposer will commence work after the transmittal of a fully executed contract.

## **SECTION 5**

### **RFP SUBMISSION REQUIREMENTS**

#### **5.1 General Information**

1. If a Proposer cannot meet a service requirement or section of the RFP, then “No Proposal” should be indicated in the relevant section of the RFP. An alternative equivalent service may be proposed.
2. If a third party provides a service, indicate this clearly in the appropriate section and include the name of the company that will provide the service.
3. Provide all costs associated with all requested services and any recommended service enhancements in the Proposal.

#### **5.2 Proposal Format**

Proposals must follow the prescribed format. Do not include any extraneous or marketing material. Proposals shall include sections using the titles as shown below.

#### **5.3 Cover Letter**

1. Legal name and address of the Proposer.
2. Address where the contract will be housed.
3. Website address of Proposer.
4. Signature of the individual authorized to bind the Proposer contractually.
5. Confirmation of the receipt of the RFP and all addenda thereto.
6. Statement that the proposal is valid for a 90-day period from the proposal due date.
7. Name, title, address, telephone number, and e-mail address of the individual to whom correspondence and other contacts should be directed during the selection process.

#### **5.4 References**

Provide three (3) government agency references for which Strategic Plan development services have been provided that are of similar size and have a similar scope of services as the district. Include the following information for each reference:

1. Contact name and title.
2. Name and address of government agency.
3. Telephone number and e-mail address of contact.
4. Services provided by the government agency.

## **5.5 Written Response**

1. Profile—Provide a general overview of the corporate structure, including the individuals/units that will be the Proposer’s lead contact for the contract.
2. Experience—Experience providing Strategic Plans to government agencies of similar size and services as the district.
3. Qualifications – Qualifications to provide consulting services to the district including, but not limited to, certifications, licenses, professional association memberships, training, knowledge of industry standards, and expertise with the fire service in the state of Washington and the United States. Describe what sets the Proposer’s services apart from others.
4. Service Availability – Include hours of operation and after-hours availability.
5. Process – Explain the process by which the Strategic Plan will be developed and written.
6. Implementation Plan—A plan for implementing the contracted services, including a proposed timeline and tasks required by the district and the Proposer.
7. Service Enhancements—Please include any service enhancements, additional services, or alternate approaches to the requested services that may not be specifically requested but would benefit the district, where feasible.

## **5.6 Cost Proposal**

Provide a list of potential procedures and associated costs to fulfill the Scope of Services. Under each list, each procedure is included, as well as the associated fee. If services are offered under a category at no cost to the district, please indicate the services in the list with N/A for cost. Please include a sample contract form and the signature of the authorized individual to bind the Proposer contractually on the Cost Proposal.

## **SECTION 6**

### **GENERAL INFORMATION**

#### **6.1 Notice to Proposer**

The RFP does not constitute a contract or offer of employment. The proposers are responsible for the cost of preparing and submitting proposals.

#### **6.2 Rejection of Proposals**

The district reserves the right to reject any or all of the proposals and further reserves the right to waive any informalities or irregularities in any proposal. Proposals that do not address the requirements will be considered non-compliant and will not be reviewed or rated.

### **6.3 Protest of Bid Process**

Any Proposer who wishes to file a complaint about the bid process, selection process, or award method may do so in writing. Protest letters must be submitted to the district within ten (10) days of awarding the contract.

### **6.4 Discrepancy or Other Errors in RFP**

If a Proposer perceives a discrepancy, conflict, omission, or error amongst terms within the RFP or between the RFP and any other relevant documents, the Proposer shall immediately and timely notify the district in writing of the specific problem(s) perceived. Notice of any modification made by the district to the RFP and any relevant documents at issue will be sent to all parties who were sent an RFP and of which the district is aware.

If a Proposer fails to notify the district of the perceived error in a timely manner before the date and time stated for proposal submission, the proposal shall be submitted at the Proposer's own risk. If awarded the contract, the contractor shall not be entitled to additional compensation, damages, or time because of any and all perceived errors or their later correction.

### **6.5 Conflict of Interest**

A conflict of interest exists where an individual could benefit directly or indirectly from access to information or a decision over which they may have influence. It includes a perceived conflict where someone might reasonably perceive such benefit and influence. A conflict of interest occurs when a staff member or Proposer attempts to promote a private or personal interest that results in an interference with the objective exercise of their job responsibilities or gains any advantage by virtue of his/her position with the district or businesses, consultants, or individuals doing business with the district. Conflicts of interest may be real, potential, or perceived.

In writing, the Proposer should disclose conflicts of interest to the district, which will consider the nature of the Proposer's responsibilities and the degree of potential or apparent conflict in deciding the course of action that the Proposer needs to take to remedy the conflict of interest.

### **6.6 Limitations**

The district reserves the right to reject any or all proposals and to waive any and all irregularities in choosing the successful Proposer and may amend the scope of this RFP at any time and in any manner which, in its opinion, best serves the district interests. The district expects to complete its evaluation process to select a qualified Proposer but reserves the right to change key dates and actions as needed. The district intends to award the project to one Proposer; however, the district retains the right to award one or more separate contracts to one or more Proposers at the district's sole discretion. The proposals in response to this RFP will become the district's property and may be used by the district in any way it deems appropriate. The district reserves the unqualified right to modify and/or suspend any and all aspects of the RFP, to request further information from any firm or



person responding to the RFP, to waive any defect as to form or content of this RFP or any response thereto, to extend deadlines for accepting responses or accept amendments to responses after expiration of deadlines and to reject any and all responses to the RFP.

No individual or firm responding to this RFP shall obtain any claim or right of action against the district because of any aspect of the RFP, defects or abnormalities contained herein, defects or abnormalities in the selection process, the rejection of any proposal, the acceptance of any proposal, any statements, representation, acts or omissions of the district, the exercise of any discretion by the district in connection with any of the foregoing, or any and all other matters arising out of all or any of the foregoing.

The district shall not be obligated to respond to any proposal submitted nor be legally bound in any manner by submission of the proposal.

The district is not required to accept the lowest-price proposal. Various factors will be evaluated to determine the most advantageous proposal based on, for example, experience, financial strength, technical capability, costs, and performance. The Proposer shall bear all costs of preparing and submitting responses to this RFP.

## **SECTION 7**

### **ATTACHMENT A: INSURANCE REQUIREMENTS**

#### **Minimum Insurance**

The accepted Proposer (“Contractor”) shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property that may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, or employees.

The contractor shall maintain limits no less than:

1. General Liability, including operations, products, and completed operations, as applicable

\$1,000,000 per occurrence for bodily injury, personal injury, and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.

2. Errors and Omissions Liability

\$1,000,000 per occurrence or per claim. If protection is accomplished through a “claims made” policy, a 36-month extended reporting period shall be provided.

3. Automobile Liability

\$1,000,000 per accident for bodily injury and property damage.

#### **Deductibles and Self-Insured Retention**

Any deductibles or self-insured retention must be declared to and approved by the district. At the district's option, either the insurer shall reduce or eliminate such deductibles or self-insured retention with respect to the district, its officers, officials, employees, and volunteers, or the Contractor shall provide a financial guarantee satisfactory to the district guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

#### **Other Insurance Provisions**

The general liability is to contain, or be endorsed to contain, the following provisions:

1. The district, its officers, officials, employees, and volunteers are to be covered as additional insured with respect to liability arising out of activities performed by or on behalf of the Contractor or automobiles owned, leased, hired, or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the district, its officers, officials, employees, or volunteers.

2. For any claims related to the services provided by the Contractor, the Contractor's insurance coverage shall be primary insurance with respect to the district, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the district, its officers, officials,

employees, or volunteers shall be in excess of the Contractor's insurance and shall not contribute to it.

3. Failure to comply with reporting or other provisions of any policies required by this clause, including breaches of warranties, shall not affect coverage provided to the district, its officers, officials, employees, or volunteers.

4. The Contractor's insurance shall apply separately to each insured against whom a claim is made or suit is brought, except with respect to the limits of the insurer's liability.

5. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled **by either party, except for non-payment of premium**, after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the district. In the event the policy is canceled for non-payment of premium, ten (10) days prior written notice, as stated above, will be given.

**Attachment “B”:** PRICING SCHEDULE

The proposal will include a price breakdown of all work, estimated hours, unit price, and estimated total price. An example is below.

**1. Review Current Conditions (SWAT), (COWS)**

Item	Description	Hours	Unit price	Total Price
1	Research District	1.5	\$50hr	\$75.00
2				
3				
4				

**2. Strategic Initiatives (5 Year)**

Item	Description	Hours	Unit price	Total Price
1	Year 1	1.5	\$50hr	\$75.00
2				
3				
4				

**3. Evaluate and/or develop Mission, Vision, and Value statements**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**4. Engage the community internal and external stakeholder input**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**5. Evaluate and/or develop the district's Mission, Vision, and Value statements**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**6. Engage the community and collect both internal and external stakeholder input**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**7. Develop draft and final versions of the Strategic Plan**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**8. Establish realistic strategic initiatives for the future**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**9. Present the final Strategic Plan to the Board of Fire Commissioners**

Item	Description	Hours	Unit price	Total Price
1				
2				
3				
4				

**Total Price:**