

EXHIBIT A

Proposed Scope of Work

Strategic Planning Facilitation and Plan Development

The City of Fair Oaks Ranch (“the City”) is seeking proposals from qualified consulting firms to facilitate a **comprehensive strategic planning process** that engages the community, elected officials, and City staff in shaping the City’s vision for the future. The process will result in the development of a clear, actionable **Strategic Plan** that includes measurable goals, objectives, and initiatives to guide decision-making and resource allocation over the next 5 years.

The City’s intent is to have City staff conduct annual updates of the adopted Strategic Plan; however, the City may choose to engage the selected firm to facilitate future annual updates under a separate agreement.

1. Objectives

The objectives of this engagement include:

1. **Community Engagement** – Facilitate an inclusive public process that gathers input from a broad range of stakeholders through **town-hall style meetings** and other engagement methods.
2. **City Council Alignment** – Work closely with the City Council through at least **two formal presentations/work sessions** to ensure alignment on vision, goals, and priorities.
3. **Strategic Plan Development** – Produce a well-organized and visually engaging final Strategic Plan document that:
 - Defines **goals** supported by measurable **objectives**.
 - Identifies specific **initiatives and action steps** tied to each objective.
 - Proposes **meaningful quantitative measures** (performance indicators) for all objectives, and goals where feasible.
4. **Implementation Readiness** – Provide clear guidance that enables City staff to self-perform annual updates and track progress.

2. Tasks & Deliverables

The selected consultant will be expected to perform the following tasks:

Task 1: Project Initiation & Work Plan

- Conduct a kick-off meeting with City staff to confirm scope, schedule, and engagement strategies.
- Develop a detailed work plan outlining key milestones, engagement opportunities, and deliverables.

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Task 2: Community Engagement

- Design and facilitate **public, town-hall style meetings** (minimum of two) to gather community input.
- Provide materials, surveys, or other tools as needed to ensure broad and equitable participation.
- Summarize and synthesize community input into key themes for consideration in the strategic planning process.

Task 3: City Council Engagement

- Facilitate at least **two work sessions or presentations** with the City Council:
 1. **Initial Work Session** – Review community input, discuss vision, review emerging goals and objectives.
 2. **Draft Plan Presentation** – Present the draft Strategic Plan for review and feedback.

Task 4: Strategic Plan Development

- Draft a comprehensive Strategic Plan that includes:
 - **Vision and Mission Statements** (if refinement or reaffirmation is desired).
 - **Goals** – Broad outcome statements aligned with the City's vision.
 - **Objectives** – Specific, measurable statements supporting each goal.
 - **Initiatives/Action Steps** – Recommended actions to achieve each objective.
 - **Performance Measures/Key Performance Indicators (KPIs)** – Quantitative measures for each objective, and for goals where appropriate.
- Incorporate City Council and staff feedback into a final version of the Strategic Plan.
- Deliver a visually formatted, publication-ready final document (digital and print-ready PDF).

Task 5: Optional Future Services

- Provide a cost proposal for facilitating **annual updates** or progress reporting sessions, should the City elect to engage the consultant in future years.

3. Deliverables

At minimum, the consultant shall provide:

1. **Work Plan & Schedule** (electronic).
2. **Community Engagement Materials** (surveys, presentations, summary reports).
3. **Draft Strategic Plan** (electronic, for staff and Council review).
4. **Final Strategic Plan Document** (publication-ready digital version, with an editable file for staff updates).
5. **Presentations to City Council** (minimum of two).

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4. Schedule

The City anticipates the strategic planning process to begin with the RFP solicitation in October 2025 and conclude with adoption of the Strategic Plan in April 2026. The consultant shall propose a detailed project schedule based on estimated key milestones identified below in their proposal.

Milestone	Estimated Target Date	Notes
RFP Published	Mid-October 2025	Posted to City website and distribution networks
Pre Bidder's Conference	Late October 2025	14 days after release. Conference transcript posted publicly.
Deadline for Questions / Clarifications	Late October 2025	21 days after release. Responses posted publicly.
Proposals Due	Mid-November 2025	30-day response period from RFP publication
Evaluation & Shortlisting	November 17 – November 28, 2025	Initial scoring and potential interviews.
Vendor Selection & Council Award	Early December 2025	Council awards contract (Dec 4th or 18th)
Project Kick-Off Meeting	Mid-January 2026	Consultant, City staff, and key stakeholders.
Community Engagement (Town-Hall Meetings)	Late January – February 2026	At least two town-hall style public meetings.
Council Work Session #1 (Vision/Priorities)	Mid-February 2026	Review community input, align on goals.
1 st Draft Strategic Plan Completed	Mid-March 2026	Consultant submits near-final DRAFT
Council Work Session #2 (Draft Plan Review)	Late March 2026	Council feedback incorporated.
Final Strategic Plan Presented for Adoption	Early April 2026	Council approval by Resolution

5. City Responsibilities

The City will:

- Designate a project manager to serve as the primary point of contact.
- Provide background materials, existing plans, and relevant data.
- Assist with promotion and outreach for community engagement events.
- Provide meeting facilities (as needed).

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6. Optional Considerations for Proposals

Proposers are encouraged to describe innovative engagement methods, data visualization tools, or performance tracking methodologies that may enhance the strategic planning process or ongoing implementation.

Sample Scoring Matrix

Evaluation Criteria	Weight (%)	Scoring Description
Cost Proposal	30%	Competitive pricing, clarity of cost structure, value relative to scope.
Relevant Experience & Qualifications	25%	Demonstrated experience with municipal strategic planning, facilitation, and community engagement; qualifications of proposed team members.
Approach & Methodology	20%	Quality and clarity of proposed work plan, timeline, and engagement strategy; understanding of City needs.
Quality of Similar Work (Past Performance)	15%	Examples of prior strategic plans, measurable outcomes, and references.
Innovation & Value-Added Services	10%	Creative engagement methods, data visualization, performance tracking tools, or other enhancements.
Total	100%	—

Sample Scoring Method

- Each category scored on a **0–5 scale** (0 = not addressed; 5 = excellent).
- Weighted score = (raw score ÷ 5) × weight.
- Highest total weighted score = recommended vendor.