



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

15160 Jackson Road, Rancho Murieta, CA 95683

Office - 916-354-3700 * Fax - 916-354-2082

SECURITY COMMITTEE

(Director Tim Maybee)

Regular Meeting

November 5, 2020 at 10:00 a.m.

This meeting will be held via ZOOM video conference only pursuant to Gov. Newsom Executive Order N-29-20. You can join the conference by (1) logging on to <https://us02web.zoom.us/j/84508386052>, entering Meeting ID no. 845 0838 6052, and using the audio on your computer, or (2) dialing into 1-669-900-9128 and entering the meeting code 845 0838 6052. Those wishing to join with audio only can simply call the telephone number above and enter the code. Participants wishing to join the call anonymously have the option of dialing *67 from their phone. Please refer to your telephone service provider for specific instructions. **PLEASE NOTE – MOBILE DEVICE USERS MAY NEED TO INSTALL AN APP PRIOR TO USE AND MAC AND PC DESKTOP AND LAPTOP USES WILL REQUIRE YOU TO RUN A ZOOM INSTALLER APPLICATION – PLEASE FOLLOW DIRECTIONS AS PROVIDED BY ZOOM. IT IS RECOMMENDED YOU ATTEMPT TO LOGIN AT LEAST 5 MINUTES BEFORE THE START OF THE MEETING.**

AGENDA

1. Call to Order
2. Comments from the Public
3. Monthly Updates
 -  Operations
 -  Incidents of Note
 -  Contract Security/Staffing Update
4. Surveillance Camera Policy
5. Review Security Service Opinion Survey RFQ
6. Joint Security Committee Discussion
7. Director and Staff Comments/Suggestions
8. Adjournment

"In accordance with California Government Code Section 54957.5, any writing or document that is a public record, relates to an open session agenda item and is distributed less than 24 hours prior to a special meeting, will be made available for public inspection in the District offices during normal business hours. If, however, the document is not distributed until the regular meeting to which it relates, then the document or writing will be made available to the public at the location of the meeting."

In compliance with the Americans with Disabilities Act and Executive Order No. N-29-20, if you are an individual with a disability and you need a disability-related modification or accommodation to participate in this meeting or need assistance to participate in this teleconference meeting, please contact the District Office at 916-354-3700 or awilder@rmcsd.com. Requests must be made as soon as possible.

Note: This agenda is posted pursuant to the provisions of the Government Code commencing at Section 54950. The date of this posting is October 30, 2020. Posting locations are: 1) District Office; 2) Post Office; 3) Rancho Murieta Association; 4) Murieta Village Association.

MEMORANDUM

Date: November 4, 2020
To: Security Committee
From: Tom Hennig, General Manager
Subject: Security Update Report for the Month of October

OPERATIONS UPDATES

The Department is currently working on the following projects:

- Holding Security Team Meetings
- Repurposing VIPs truck for regular Patrol use
- Replacing South Entry Security Gate
- Budget
- Additional PDF Staff to support Security Patrol until vacancies are filled
- Continue to work on Security Chief support
- Staffing is now based on Measure J approved level of two Gate Officers and one Patrol Officer 24/7/365

Rancho Murieta Association activity:

We have met with the RMA Leadership on numerous occasions. Our focus is to improve our level of service while attempting to live within the budget as much as possible. We have stressed with our Gate and Patrol Officers the need to follow their training and to stay safe. If there are incidents where there is a safety concern, they notify Security Dispatch to call the Sacramento Sheriff's Department. The following list is the current focus of our meetings.

- General calls for service
- Golf Carts and underage driver enforcement
- General non-architectural enforcement
- Stop Sign enforcement
- Speed enforcement
- Meeting with RMA on Fire Safety issues

Murieta Village activity:

- Village entry camera solution
- Regular patrol activity

Rancho Murieta Commercial Owners Association activity:

- Anticipate installing two surveillance cameras on Murieta Drive by the end of November
- Establishing a regular meeting schedule.
- Evaluation of the potential for issuing citations for association related rule violations

RMA Violation Item Summary Report - 2020

In the past, District Security maintained a listing of RMA related activity. Because the District's stats were based on a different set of criteria than those prepared by the RMA, we have stopped providing our list. We are now providing the statistics provide by the RMA. In the future we plan to utilize meaningful reports from the District's ABDI Security Computer Aided Dispatch, (CAD) and Incident Reporting Management System, (RMS).

Rancho Murieta Association Violation Item Summary Report -- 2020 Violations Written by RMCS Security

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Violation Item Summary Report	CSD	CSD	CSD	CSD									
Motor vehicle violations:													0
Motorcycle													0
No drivers license	1		2				2	3		1			9
Speeding	2	4	19	11	2	5	1	7	1	5			57
Speeding - twice speed limit													0
Stop signs			4			4		4					12
Bus stop signs													0
Use of streets	1							1					2
Parking:													
Driveway parking	10	9	11	1	1	2		33	3	4			74
Guest parking	1	4	3		1			1	4				14
Overnight street parking	4	1	5	1	3	13	1	25	17	11			81
Unauthorized Vehicle (24 hr pass)		3	2	3		15	8	6	10	1			48
Accumulation/dumping of debris										1			1
Advertising signs													0
Barbeques, open fires, bonfires					7		4						11
Carrying passengers/overloaded cart													0
Clothes lines													0
Commercial vehicle lettering													0
Construction overnight parking													0
Park hours / curfew	2	5	5	14	10	6	19	4	4	5			74
Decorative lights													0
Discharge of firearm													0
Dog park investigations													0
Dwelling exterior alterations													0
Failure to identify													0
Fences, screens & enclosures													0
Guest w/o resident in comm areas			2	1				2	1				6
Home business activities													0
Noxious activities						1				1			2
Open garage doors													0
Pets - off leash / teathered / noise							2						2
Property maintenance													0
Sign rules													0
Skating in common area		2											2
Sports equip/trampoline/basketball			1										1
Storage of building materials													0
Stored vehicles		2			1								3
Trash containers													0
Use of common areas & facilities													0
Vandalism													0
Vehicle repair or maintenance													0
Village/Villas violations													0
Working days & hours				1			1	1					3
Total Violations Written by CSD	21	30	54	32	25	46	38	87	40	29	0	0	402

INCIDENTS OF NOTE - SEPTEMBER

- September 1, 1927 hours, gunshots heard at the yellow bridge. R/P heard (9) gunshots that sounded like the shots were going into the water. Patrol arrived on scene and found no subjects at the bridge. Perhaps the gunshots were coming from the Hutchison ranch property. CSD dispatch advised to notify SSD.
- September 3, 2054 hours, Rio Oso and Park 1 area. Possible intoxicated driver. Vehicle description was given. Patrol checked the area for the vehicle it was not located.
- September 4, 2247 hours, Riverview Park. R/P stated juveniles are being loud in the park after hours. Patrol arrived and observed a small group of juveniles at the park. All the juveniles dispersed to the back of the park and into the field toward the wooden bridge.
- September 5, 1344 hours, Colbert Dr. R/P theft of their granddaughter's bicycle which was parked at the side gate door of the residence. Report was taken by CSD patrol.
- September 11, 2022 hours, Medical on Carmella Circle medical self-inflicted wound. Patrol responded cleared the scene. Fire/medical arrived transported patient to the hospital.
- September 11, 2044 hours, Riverview Park a group of Juveniles are being loud at the park according the R/P. Patrol arrived advised the juveniles of the park hours.
- September 12, 1411 hours, vehicle accident. Two vehicles involved at the intersection of Murieta Parkway and Highway 16. Minor accident with no injuries. Both drivers involved in the accident exchanged information, CHP was advised.
- September 14, 0927 hours, R/P advised the playground structure at stone house park had been spray painted with graffiti. Patrol arrived took photographs of the slide that had been spray painted.
- September 16, 2116 hours, Juvenile runaway Lago Drive. R/P advised her daughter ran away from home. Patrol advised of the situation. The juvenile was found to be residing at a friend's house for the night and was okay.
- September 20, 1507 hours, Trinidad Court R/P advised that at least three juveniles allegedly are smoking marijuana in the area. Patrol checked the area for the juveniles. Unable to locate them.
- September 23, 2141 hours, Petty theft. Several items were stolen from a golf cart while at north beach. R/P give a verbal description to CSD dispatch of the items taken. R/P wishes to only have the incident documented and does not want to speak with patrol at this time.
- September 24, 2127 hours, truck parked in the Riverview parking lot with several juveniles in it were setting off firecrackers. Patrol arrived unable to locate the truck or juveniles.
- September 25, 2202 hours, Puerto Drive what sounded like a BB gun being shot in front of a residence home. R/P went out to the front yard and noticed a political sign had been stolen. Patrol responded and spoke with the R/P and neighbors. Unable to locate who was responsible for stealing the sign.

INCIDENTS OF NOTE - OCTOBER

- The summary of October incidents will be added to this report prior to the meeting tomorrow morning.

JOINT SECURITY MEETING

We are working with the RMA and other RMCSA area associations to establish regular, formal Security meetings.

MEMORANDUM

Date: November 4, 2020
To: Security Committee
From: Tom Hennig, General Manager
Subject: Draft District Surveillance Camera Policy

RECOMMENDED ACTION

Review and discuss draft District Surveillance Camera Policy.

BACKGROUND

Upon request of Board members, District staff have drafted a proposed District Surveillance Camera Policy. The draft policy is included with this packet. This policy has been reviewed by Dick Richard Shanahan, District Legal Counsel, and Committee Members with updates incorporated into the attached Policy.

If approved by the Committee, we will prepare the policy for Board for adoption.

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

Category:	Security	Policy # P2020-01
Title:	District Surveillance Cameras	

PURPOSE

District surveillance camera systems (Personnel worn or fixed locations) provide accountability and transparency to the public and will provide a recording of an incident or events that may document conduct or enforcement activity or supplement a report.

The principal purpose of this policy is to provide the Rancho Murieta Community Services District's (District) Security Department with the appropriate procedures, policies, and responsibilities for the use of the District surveillance camera systems as well as the management, storage, and retrieval of audio/video material recorded by District surveillance cameras. Recorded data serves multiple purposes to the District by protecting citizens, District property, District personnel and identifying trends.

POLICY STATEMENT

The use of District surveillance camera systems provides persuasive documentary evidence and helps to prove criminal or wrongful conduct or to defend against civil litigation and allegations of officer or general public misconduct. District surveillance cameras are located throughout the District and are placed in locations that will offer views of sensitive and vital areas of the District as needed or requested. District personnel assigned to use surveillance camera and video systems will adhere to the operational objectives, policies, responsibilities, and procedures outlined in this policy to maximize the effectiveness and utility for the District surveillance camera system and the integrity of evidence and related video documentation. District employees who violate this policy will be subject to disciplinary action, up to and including termination.

OBJECTIVES

The District's Security Department uses surveillance camera systems to accomplish the following primary objectives:

1. To enhance Gate and Patrol Officer safety and accountability.
2. To accurately capture statements and events during the course of an incident.
3. To enhance the Gate and Patrol Officer's ability to document and review statements and actions for both internal reporting requirements and investigations.
4. To provide an impartial measurement for self-critique, evaluation, performance, and professionalism.
5. To capture visual and audio evidence/information for use in current and future investigations and proceedings.
6. To insure the safeguarding of District property.

DISTRICT RESPONSIBILITIES

1. The District may install and operate surveillance camera systems as it deems appropriate or requested in designated areas within the District. District personnel will use only District-owned and operated surveillance camera systems.
2. The District will provide Gate, Patrol Officers, and Sergeants with training on the use of surveillance cameras and video systems.
3. The District will approve media viewing and duplication devices.

OFFICER RESPONSIBILITIES

1. When necessary to help ensure the accuracy and consistency of accounts for written reports or statements or in preparation for an interview, Gate and Patrol Officers may contact the Patrol Sergeant or the Security Chief and request to review the audio or video recording of an incident in which he or she was involved.
2. Gate and Patrol Officers will not erase, alter, reuse, modify, edit, duplicate, share, distribute, or tamper with any surveillance camera systems, recording or storage devices.
3. Gate and Patrol Officers will notify the Patrol Sergeant or Security Chief when the surveillance camera system has captured an apparent felony, misdemeanor, or other incidents and events to be followed up with either the District or Rancho Murieta Association, or any event requested as evidence by a peace officer.
4. Patrol Officers shall operate the surveillance cameras and video systems in accordance with the manufacturer's guidelines, departmental policy, and training.
5. Gate and Patrol Officers shall immediately report any known malfunction, damage, or theft of the surveillance camera system to the Patrol Sergeant or Security Chief so that a repair or replacement unit may be provided.
6. To reduce the risk of damage, original recordings shall not be viewed in any equipment other than the equipment authorized by the Security Chief.
7. Surveillance cameras and systems will remain in the area designated by the District.

SERGEANT RESPONSIBILITIES

1. When an incident arises that requires the immediate retrieval of the recording, the Patrol Sergeant, Security Chief or designee shall transfer the recording to the Security Chief's computer video storage file on the District's Security Network.
 - a. Upon downloading, the Security Chief or designee shall flag the entry as evidence to ensure that it will not be inadvertently deleted after the one-year retention period (per Government Code, Section 53160) for non-evidence or investigation related recordings.

2. Security Chief or Sergeant shall conduct periodic reviews to:
 - a. Ensure the equipment is being used in accordance with policy and procedures.
 - b. Report and correct any Gate and Patrol Officer discrepancies in the use of the surveillance camera system.
 - c. Make recommendations for revision to the policy, procedures, officer training, or equipment needed.
 - d. Inspect for equipment damage, loss or misuse and to report and investigate the cause.
 - e. Assess Patrol Officer performance.

3.

MEDIA DUPLICATION

1. All surveillance cameras, equipment, recorded media, recorded images, and audio/video recordings are the property of the District. Accessing, copying, distributing, using or releasing video or audio files outside of the District or for non-Security Department purposes is strictly prohibited.
2. Requests to review or copy video/audio recordings made under the Public Records Act shall be made through the District. Each request will be evaluated and responded to on a case-by-case basis and in accordance with the requirements of the Act. If a recording is to be released, only the incident or incidents specifically requested shall be duplicated. The District may reserve the right to redact the video to protect the privacy interests of innocent or third parties not directly involved with the specific incident. The District reserves the right to decline a request for the following records: investigatory or security files compiled by the District for law enforcement or licensing purposes; any record where, on the facts of the particular case, the public interest served by not disclosing the record clearly outweighs the public interest served by disclosure of the record; records concerning confidential crime victim, sexual assault or child abuse images or recordings; and, any other record exempt from disclosure under the Public Records Act.
3. To prevent damage to or the alteration of the original recorded media, it shall not be moved or copied to, viewed in, or otherwise inserted into any non-District approved computer or other devices.
4. When possible and practical, a copy of the original recorded media stored in evidence shall be used for viewing by investigators, staff, training personnel, etc., to preserve the original media in pristine condition.
5. At the conclusion of any court proceeding, investigation, or hearing involving District surveillance data or media, all copies shall be submitted back to the District.
6. A Patrol Officer may review video footage of an incident in which he or she was involved before making a statement or being interviewed or examined about the incident.

MEDIA STORAGE, RETENTION AND DESTRUCTION

1. Recorded data from the surveillance camera systems shall be retained in the Security Chief's office for a minimum of one year (as required by Government Code section 53160).
2. After one year, if the data is not needed for evidence, training, a pending disciplinary matter, pending criminal case, civil lawsuit, claim or other proceeding, other investigative or law enforcement purpose or pending citizen complaint, the General Manager is authorized to destroy and erase the data within the computer system in a manner consistent with current District Policy.
3. Recorded data from surveillance camera systems shall not be destroyed or erased without the General Manager's approval.

**Approved Rancho Murieta Community Services District
Board of Directors**

Adopted

MEMORANDUM

Date: November 4, 2020
To: Security Committee
From: Tom Hennig, General Manager
Subject: RFQ Update – Security Service Opinion Poll

RECOMMENDED ACTION

Inform the Security Committee of the action taken by the Finance Committee for the Request for Quotes (RFQ) for Consulting Services to conduct an Opinion Poll of the residents, landowners, and businesses within the Rancho Murieta CSD Boundaries. This RFQ was approved by the Finance Committee November 3, 2020 and was released by District Staff November 5, 2020.

DISCUSSION

We have prepared a Request for Quote, Exhibit A, to establish a plan to conduct a Community Opinion Survey regarding Security Services. This poll will be to survey Rancho Murieta residents, landowners, and businesses, to determine the potential for replacing or supplementing Measure J, which was passed by the voters in 1998. The goal is to award the contract in December 2020 and conduct the poll in February 2021. Once awarded, the consultant will establish a schedule to include the following phases.

Phase 1: Planning and Design

- Kick-off meeting/confirmation of research needs and goals
- Review background materials, demographics and key stakeholders
- Meetings/workshops with stakeholder groups
- Develop a survey questionnaire
- Prepare data collection instrument
- Identify population and sampling parameters
- Test the survey questionnaire

Phase 2: Survey the Community

- Ensure participation reflects community demographics
- Finalize the target population, invite participation
- Conduct the survey (phone interviews, online – optimal media to be proposed)
- Monitor progress, identify and address issues
- Populate the data collection instrument

Phase 3: Analyze and Report the Results

- Tabulate the direct responses
- Cross-tabulate results, variables
- Perform statistical analysis
- Identify key findings, conclusions, and recommendations
- Draft final report, with summary
- Deliver findings to District; present to Board

A key component of the first phase of this project will be to hold stakeholder meetings with the various groups within the District. The polling company will need to establish the survey questions to meet the perceived needs of the community. This phase is expected to take two to four weeks.

SUMMARY

After approval of the Finance Committee on November 3, 2020, District Staff released the RFQ November 5, 2020. The RFQ response deadline will be Wednesday, November 25. If successful, this item will be placed on the December 2, 2020 Finance Committee agenda. If necessary, we will present the contract for approval at the December 16, 2020 Board meeting. The list below is the current estimate for the timing of events.

1. Receive RFQ responses – November 25, 2020
2. Report results and recommendation to Finance Committee – December 2, 2020
3. If necessary, request approval to award contract at the December 16, 2020 Board Meeting
4. Begin project with Stakeholder meetings in January 2021
5. Conduct polling activities in February 2021
6. Present polling results to Finance Committee on April 6, 2021
7. Presentation to the Board on April 21, 2021
8. Possible voter referendum in June 2021



Rancho Murieta CSD

Community Services District

REQUEST FOR QUOTE:

Conduct a
COMMUNITY OPINION SURVEY
Regarding
SECURITY SERVICES

RANCHO MURIETA
COMMUNITY SERVICES DISTRICT

District Contact:
Tom Hennig
General Manager

Responses Due By:
November 25, 2020
At 5:00 p.m.

**RANCHO MURIETA COMMUNITY SERVICES DISTRICT
REQUEST FOR QUOTE (RFQ)
COMMUNITY OPINION SURVEY: SECURITY SERVICES**

I. INTRODUCTION

Rancho Murieta Community Services District (the District, or RMCS D) is requesting proposals, including a price quote, from firms qualified to conduct a public opinion poll of the District's residents. Work on this initiative is expected to begin in December 2020 and be completed in April 2021. The District reserves the right to reject all quotes and to waive any informality.

The District is the only special district in California to provide in-house, 24/7 security services to its community. To best serve the community, the District is reviewing the elements and level of the security services it presently provides, with an eye to future improvements. The purpose of this survey is to clearly understand the community's awareness, perceptions, and priorities for such safety services.

The District will not reimburse responding firms for any expenses incurred in preparing responses to this RFQ.

Any inquiries concerning this request for quotes should be addressed to Tom Hennig, General Manager, via email at thennig@rmcsd.com.

II. BACKGROUND

A. The Rancho Murieta Community

Rancho Murieta Community Services District (the District, or RMCS D) was formed in 1982 by State Government Code 61000 to provide essential services in Rancho Murieta. The District provides essential services to an area of 3,500 acres (covering roughly five and a half square miles) located on the Cosumnes River in the rolling hills of eastern Sacramento County. The approved master plan calls for residential development on 1,920 acres with single-family residences, townhouses, apartments, and mobile homes for a total of 5,189 units. Current estimates indicate Rancho Murieta has about 2,700 households with a population of roughly 6,000 persons. The community is a balanced blend of both custom and production homes, townhouses, mobile homes, and a growing commercial complex that includes a hotel and spa, airport, grocery store, restaurants and retail outlets, office building, fire station, and a premier equestrian center.

The Community Services District is an independent Special District which provides the following services:

- Water supply collection, treatment, and distribution
- Wastewater collection, treatment, and reuse
- Storm drainage collection, disposal, and flood control
- Security
- Solid Waste collection

While each service maintains and operates under its own separate budget, a combination of taxes, special taxes, and user fees fund these services.

As noted above, RMCS D is somewhat unique as the only special district in California to provide in-house, 24/7 security services to its community. The District is determined to deliver superior community services – efficiently, professionally, and at a reasonable cost - while responding to and sustaining the enhanced quality of life the community desires. Information about the Rancho Murieta community and the fiscal situation of the District is available on the District website at <https://www.rmcsd.com>.

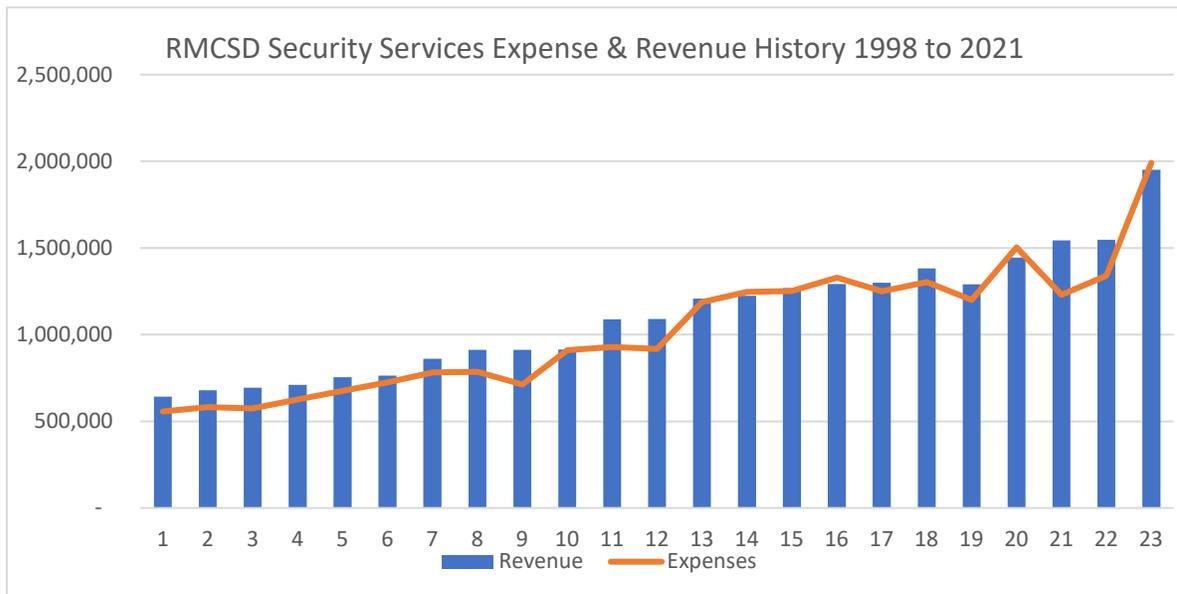
B. Security Services at Rancho Murieta

Two of the most important reasons for living in Rancho Murieta are the privacy and Security it provides. All residents and commercial entities benefit from 24-hour patrol, seven days a week. Most of the residential property is gated and surrounds two world-class golf courses. Entrances into the private residential areas – one gate each for the North and South areas - are staffed 24 hours a day while providing automated access lanes for residents with barcodes on their vehicles.

Security services at Rancho Murieta are funded by a Special Tax, approved by the voters as Measure J in 1998. Measure J established methods for setting monthly rates for security services based on the nature of the property: residential, commercial, and undeveloped properties. The baseline level of service was established as two (2) gate officers and one (1) patrol officer working 24/7/365. Initially, the base-year rates provided sufficient funds to support these around-the-clock operations. During the first few years, rates were set below the maximum allowed due to lower budgetary needs. Roughly ten years later, the rates were increased to keep up with the rising costs. Since 2010, costs have risen and surpassed the rate increases allowed by Measure J.

To address this budgeted shortfall, the District has been supplementing the special tax revenue with general-purpose property tax revenue. This practice became necessary as the cost of security services has outpaced revenue growth (see chart below). For fiscal year 2020-21, the District has allocated sixty-five percent (65%) of property tax revenue to support Security. Without a significant change in the level of services or an influx of

new ratepayers, the District cannot sustain the practice of spending property taxes on Security.



In light of these budgetary concerns, as well as other issues and the need for continuous improvement, the District leadership has decided to conduct a voter opinion survey to assess voter awareness, perceptions, and priorities for the District’s public safety services.

Since 1998 the District and the Rancho Murieta Homeowners Association (RMA), have surveyed the community several times regarding Security. While some of these efforts have lacked clear and statistically valid results - including a 2016-18 effort to add security cameras – what is clear is that the community generally appreciates the level of Security provided, and would enjoy an even higher level of service, but is reticent to pay significantly more. The goal of this proposed survey is to allow the District identify how, and at what level, it should provide security services, both now and into the future.

The community has grown significantly since 1998, in terms of both residential customers and commercial additions. Recent additions include the Murieta Inn & Spa and, a few months ago, a top-end grocery store to complement the smaller retail entities continuing in operation. As such, the community’s overall security profile and security needs continue to change.

III. SCOPE OF WORK

As noted above, the goal of this effort is to identify the components and level of security service appropriate for this community, now and into the future. The District is seeking a firm that will, with the support of District staff, design, conduct, analyze, and report the results of a survey that will clearly identify the community’s opinion of its security

services. Without dictating a specific approach or methodology, the District anticipates a program including some combination of online/internet, email, telephone, and in-person data collection. What follows is an anticipated project schedule. Respondents to this RFQ should feel free to comment, adjust, or simplify this plan as part of their response.

Phase 1: Planning and Design

- Kick-off meeting/confirmation of research needs and goals
- Review background materials, demographics and key stakeholders
- Meetings/workshops with stakeholder groups
- Develop a survey questionnaire
- Prepare data collection instrument
- Identify population and sampling parameters
- Test the survey questionnaire

Phase 2: Survey the Community

- Ensure participation reflects community demographics
- Finalize the target population, invite participation
- Conduct the survey (phone interviews, online – optimal media to be proposed)
- Monitor progress, identify and address issues
- Populate the data collection instrument

Phase 3: Analyze and Report the Results

- Tabulate the direct responses
- Cross-tabulate results, variables
- Perform statistical analysis
- Identify key findings, conclusions, and recommendations
- Draft final report, with Summary
- Deliver findings to District; present to Board

IV. PROJECT SCHEDULE

Key project dates include:

DATE	TASK
November 5, 2020	RFQ published
November 25, 2020	Receive responses
December 2020	Evaluation and selection
January 2021	Planning and Design
February 2021	Survey the Community
April 2, 2021	Deliver Final Report for Finance Committee
April 21, 2021	Present to Board, w/ Discussion of Next Steps

The dates in this RFQ are subject to change at the District's discretion. Key drivers include work with the Board of Directors and the voting calendar, as future actions may require community vote in 2021. You may contact Tom Hennig, General Manager at thennig@rmcsd.com with any questions related to the timing of this RFQ.

V. KEY DELIVERABLES & DISTRICT ASSISTANCE PROVIDED

A. Deliverables

Contract deliverables include:

- Design, schedule, and conduct stakeholder workshops to include the following groups:
 - North and South gated residential owners (2,600 owners)
 - Murieta Village and Murieta Gardens II residential owners (270 owners)
 - Undeveloped landowners (less than 10)
 - Commercial businesses (between 20 to 30)
- A Final Report, in PDF format (preferred) or MS Word, which includes:
 - Survey questionnaire (final version) and face-value results
 - Verbatim responses to open-ended questions (if any)
 - A thorough analysis of survey results
 - Findings and Conclusions
 - Actionable Recommendations
- A Summary of Survey Findings, Conclusions, and Recommendations (PowerPoint format)

B. Administrative Support

The District will provide contact information related to community members as available and appropriate, including:

- Resident addresses, email, and phone number
- Key representatives and stakeholders, including meeting space if required
- Other available data as requested
- Copies of previous surveys (also available at RMCSd.com)

It is expected that most work by the survey firm will be completed off-site. The District may be able to provide office space as a base, as needed, while the stakeholder meetings are being performed.

C. Report Preparation

Preparation, editing, printing, and delivery of the Final Report and Summary Report are the responsibility of the survey firm.

VI. RESPONSE REQUIREMENTS

A. General Requirements

1. Inquiries concerning the RFQ and the subject of the RFQ shall be made to:

Amelia Wilder
District Secretary
P.O. Box 1050
Rancho Murieta, CA 95683
916 354 3700
awilder@rmcsd.com

2. Response Submission.

One (1) electronic copy of the Response shall be received by the District by 5 PM, on November 25, 2020, for your submission to be considered. Email your response to: awilder@rmcsd.com

The District reserves the right to request additional information or clarification from Respondents to allow for corrections of errors or omissions or to negotiate terms. The District reserves the right to retain all submissions and to use any idea(s) in a response regardless of whether that responding firm is selected. Submission indicates acceptance by the firm of the conditions contained in this request for quotes, unless clearly and specifically noted in the response, and confirmed in the contract between the District and the firm selected.

The District reserves the right to reject any or all responses, to waive any non-material irregularities or information in any response, and to accept, negotiate, or reject any items or combination of items.

B. Response Format

1. **Title Page** showing the RFQ subject; the firm's name; the name, address and telephone number, and email address of a contact person, along with the date of the response.
2. **Table of Contents** identifying the materials submitted.
3. **Signed Transmittal/Cover Letter** briefly stating the proposers' understanding of the work to be done; the commitment to performing the work within the time period; the name(s) of the person(s) authorized to represent the Respondent.

4. Detailed content as outlined in the next section.

C. Response Contents

1. Firm Qualifications and Experience

To qualify, the firm must have experience conducting community surveys or public opinion polls, including:

- Customizing survey programs according to the target population
- Intelligent questionnaire design to ensure clear results and avoid common pitfalls
- Statistical analysis of collected data
- Developing findings, conclusions, and recommendations - what the results *mean*

The Respondent should state the size of the firm, the location of the office where work on this engagement is to be performed, and the number and nature of the professional staff to be employed in this engagement.

2. Professional Staff Qualifications and Experience

Briefly identify how the firm proposes to staff and manage this endeavor. Discuss how the firm ensures quality, error-free work. Provide information on the qualifications, experience and training of the specific staff to be assigned to this engagement.

3. Similar Surveys for Comparable Communities

Please provide evidence of similar work – community surveys – conducted for entities comparable to Rancho Murieta, and experience with Security Surveys. Provide a brief description of how your firm managed the project, issues encountered and how they were resolved, how you worked with the client, general results, and how those results were ultimately presented. Sample final reports may be included as an appendix to your response. Online links to the client’s publication of your work are also allowed.

Please provide a list of three (3) client references for whom services such as those requested in this RFQ have been provided. Please provide the name of the organization, dates for which the services were provided, the nature of the work provided, and the name, address and telephone number of that client’s responsible person. The District reserves the right to contact any or all of the listed references regarding the work performed by the Respondent.

4. Proposed Survey Approach

Your response should propose a simple work plan that supports successful completion of the requested deliverables. To ensure a fair evaluation, respondents should include the following information in their discussion of their proposed survey approach:

- Research Methodology
- Work Plan and Schedule
- Use of Objective and Subjective Queries
- Data Collection Approach and Process
- Sample Size, Composition, Proposed Margin of Error
- Questionnaire Length and/or Time to Complete
- Data Management Tools and Process
- Proposed Adjustments to RFQ Requirements (if any)

5. Cost

Please provide your total and final cost to address the requirements of this RFQ, including provision of all deliverables, as a not-to-exceed amount.

Insurance

6. Insurance

Attached to the RFP is a draft copy of the District's Services Agreement (Agreement; Attachment A) which contains the insurance requirements. These requirements include Commercial General Liability, Workers' Compensation, Automotive Insurance and Professional Liability or Error and Omissions.

The selected firm will be required to maintain the minimum insurance requirements during the entire time of the engagement.

VII. EVALUATION PROCEDURES

A. Review of Responses

District Staff, consisting at a minimum of the following, will evaluate submitted responses:

- General Manager or Designee
- Controller
- Accounting Supervisor
- Consultant(s)

B. Evaluation Criteria

Responses will be evaluated on three criteria:

1. Firm qualifications, proposed staff, professionalism, and equivalent experience;
2. Proposed Approach, and work for similar clients that demonstrates:
 - A reasonable approach likely to deliver the desired results
 - Thorough data collection and analysis
 - Clear communication
 - Insight and creativity
 - Successful voter outcomes
 - Application to the Rancho Murieta environment;
3. Cost.