



# 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 RMCSD) 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](mailto:thennig@rmcsd.com).

**II. BACKGROUND**

**A. The Rancho Murieta Community**

Rancho Murieta Community Services District (the District, or RMCSD) 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, RMCSD 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.rmcisd.com>.

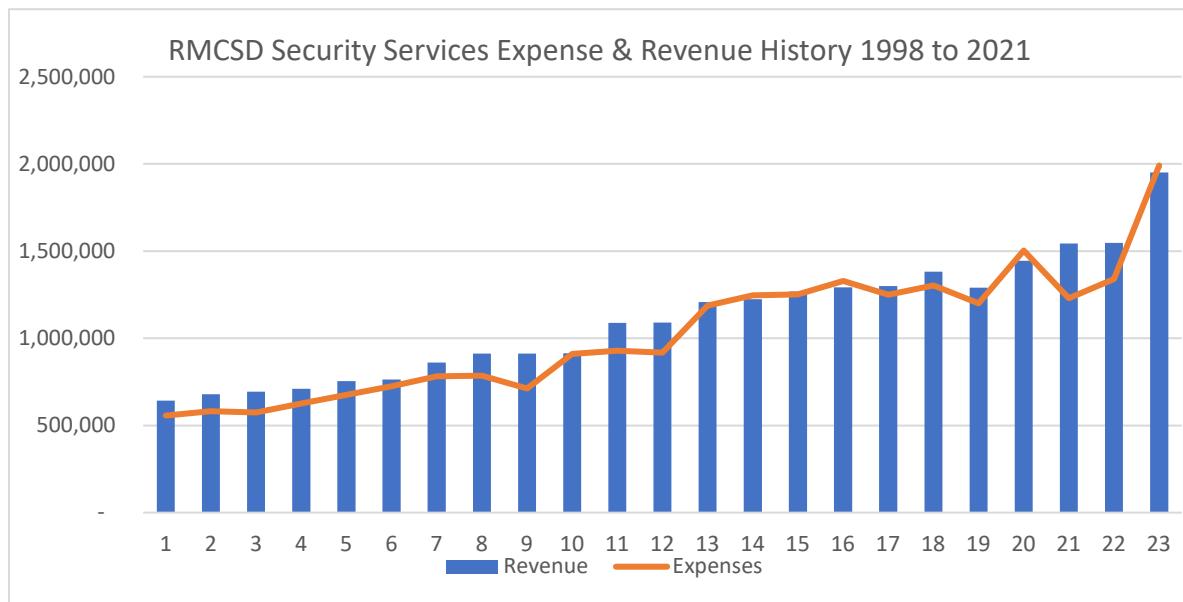
## **B. Security Services at Rancho Murieta**

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](mailto: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](mailto: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](mailto: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.

### **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

