



A Tradition of Stewardship
A Commitment to Service

Conservation, Development and Planning

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REQUEST FOR PROPOSALS

Customer Survey Development and Implementation: Napa County Permitting Departments

The Napa County Departments of Conservation Development & Planning, Public Works, and Environmental Management are requesting proposals from qualified consulting firms or individual practitioners and/or teams having familiarity with local land use development issues and stakeholders.

The selected firm, individual, or team will be asked to help develop and implement a customer service survey aimed at (1) assessing the quality and professionalism of customer services provided by County permitting departments over time; (2) identifying and prioritizing areas for improvement; and (3) evaluating customer/stakeholder support for potential changes. This effort is being funded in FY2010/2011 because identifying and prioritizing areas for improvement will have direct economic benefits if the changes identified reduce permit processing time and costs.

The selected firm, individual, or team will conduct the initial survey and develop a methodology for future surveys aimed at periodically reviewing progress towards goals identified by the departments in response to the initial survey. Use of an independent contractor/consultant is desired due to the specialized nature of the work and the need for objectivity.

Background

The Departments of Conservation, Development and Planning, Public Works, and Environmental Management have primary responsibility for permitting land use and development activities in unincorporated Napa County.¹ On an annual basis, the departments issue about 2,000 building permits, as well as a variety of other permits and entitlements. The departments also provide public information and assistance to prospective applicants and other members of the public.

While the departments use a common permit tracking system, they are physically located in different offices, and applicants are therefore required to submit multiple plan sets, and seek answers to questions at multiple locations. Most, but not all, applications are submitted through the Building

¹ The Department of Environmental Management also issues permits for activities in incorporated cities (pools, restaurants, hazardous materials storage, etc.). Also, there are other departments involved in permitting at the County, including the Agricultural Commissioner and the Fire Department.

Division of the Conservation, Development and Planning Department and routed to other departments for their review.

In the past several years, the departments have instituted a variety of processing improvements, including a “quick permit” process (7-10 days) for small building permits, an “over the counter” process (same day service) for a subset of the small building permits, and performance standards (i.e. review deadlines) for the most common application types. Some processing improvements, particularly for Planning and Public Works applications, have resulted in higher costs to applicants, since billing practices have improved and applicants are being charged based on the actual time spent in processing their applications.

The departments would like to continue improving their customer services and establish a system for measuring customer satisfaction over time. The departments would also like to solicit ideas for system enhancements, particularly from customers with experience working in multiple jurisdictions.

In 2008, a working group of several County department heads, at the request of the County Executive Officer (CEO) and the Board of Supervisors, concluded a planning effort to determine the best methods for obtaining customer feedback on all County services (i.e. not just permitting services). The working group established the following goals:

- Find out how our customers think we’re doing and why they come to us;
- Educate our customers about what we do and educate ourselves about what our customers need and want;
- Use the results of our survey to make improvements that our customers will appreciate;
- Monitor how we’re doing over time; and
- Make sure the program doesn’t become an administrative burden and doesn’t cost too much.

The group evaluated a number of survey methods and ultimately recommended an annual survey that would be promulgated at the same time every year, but for a limited period. It was thought that this approach would allow departments to benchmark or chart improvements in customer service over time, and would also allow departments to use media contacts and outreach to neighborhood/service organizations and industry groups in an effort to secure an adequate response level.

At that time, the County developed and circulated a request for proposals (RFP) for a consultant to:

- Convene approximately 4 stakeholder groups to help identify the content (questions) that should be covered in the survey;
- Develop and disseminate a survey containing two parts; Part 1 will be capable of being used for any County department; Part 2 will be customized by each department to ask questions specific to that department;
- Determine the best method to distribute and receive responses to the survey;
- Assist the County in receiving, displaying and analyzing the meaning of the data;
- Assist the County in developing action plans in response to the survey, including appropriate performance measures.

Proposals were evaluated and a firm was selected, but no contract was ever executed due to lack of funding. (The winning bidder's pre-recession era cost proposal was considered high at around \$60K.)

Proposal Submittal & Evaluation Criteria

The County is again seeking proposals from firms, individuals, and teams with expertise in designing and instituting customer service surveys aimed at getting constructive feedback. This time, knowledge of the local land use development issues, application processes, and stakeholders is being prioritized.

The selected firm, individual, or team will be expected to work closely with department managers to develop and undertake a survey that can be used to inform positive changes, assist with the evaluation of survey responses, and establish a methodology for future surveys. The County has not established a specific budget for this effort, but would like to minimize survey costs and prioritize funding for improvements identified. While not guaranteed, the selected firm may be retained for additional years if satisfactory performance is provided in the first year.

Proposals must be received prior to 4:45 p.m. on July 26, 2010 and may be emailed as a pdf to Hillary.gitelman@countyofnapa.org and/or delivered as a hard copy (one unbound original) to 1195 Third Street, Suite 210, Attention Hillary Gitelman.

Proposals may not exceed 15 pages, inclusive of all resumes and supporting materials. Proposals longer than 15 pages will not be accepted or evaluated. Proposals must contain the following:

- ✓ Firm name(s), address, designated project manager, assigned staff and contact info.
- ✓ A description of the firm's and the designated project manager's experience in conducting similar projects, including a description of the firm's previous experience working on customer service projects and knowledge of County government, local stakeholders and special audiences.
- ✓ A list of references that may be contacted regarding the firm's experience, including description of the project, name of owner, address, telephone number and person to contact, if we so choose.
- ✓ A proposed work scope for this project, including a description of your approach to the project, proposed tasks and deliverables, a proposed schedule and a cost proposal broken down by task.
- ✓ Hourly rate sheets for the firm and sub-consultants.

Following an initial screening of the submittals, a short list may be established consisting of up to three firms/teams. These firms/teams may be scheduled for an interview process, which will evaluate each firm or team's qualifications and proposals.

The selected firm will be chosen based on the following criteria:

- Demonstrated capability and relevant experience, including demonstrated ability to meet deadlines and budgets (30%)
- Satisfaction of past clientele regarded performance, open mindedness, and collaboration (30%)
- Familiarity with local development process and key stakeholders (10%)
- Creativity of the proposal in accomplishing the most with the costs proposed (NOTE: while cost is a factor, the County will use overall value to select the winning proposal) (30%)

By submitting a response to this Request for Proposal, the consultant waives all rights to protest or seek any legal remedies whatsoever regarding any aspect of this consultant selection process. The County retains the right to select any number of consultants. In addition, the County reserves the right to issue written notice of any changes in the proposal submission schedule should the County determine in its sole and absolute discretion that such changes are necessary. The County may modify this Request for Proposal prior to the date fixed for submission of proposals by issuance of an addendum to all parties who have received this Request for Proposal and by posting on the County's website. All addenda will be incorporated into the final Request for Proposal.

Acceptance of any proposal submitted pursuant to this Request for Proposal shall not constitute any implied intent to enter into a contract for consulting services. The County reserves the right to reject any and all proposals or cancel the project prior to contract execution. Furthermore, the County shall not compensate for any work done pertaining to the preparation of a proposal, preparation for and attendance of an interview, and/or contract preparation work made in response to this solicitation. The cost of developing the proposal is the sole responsibility of the consultant; the County is not liable for any costs incurred by those submitting proposals.

All proposals submitted in response to this Request for Proposal will become the property of the County. The consultant must identify in writing all copyrighted material, trade secrets, or other proprietary information that it claims is exempt from disclosure under the Public Records Act (California Government Code Sections 6250, et seq.)

Contact: Hillary Gitelman by email at Hillary.gitelman@countyofnapa.org