



# CITY OF SAN CARLOS

## REQUEST FOR PROPOSALS:

### Election Campaign Consultant Services

**Release Date: April 8, 2025**

Proposals must be received via email by **3:00 p.m. PDT on April 28, 2025** at the following address:

Quinne Woolley  
Management Analyst, City of San Carlos  
[gwoolley@cityofsancarlos.org](mailto:gwoolley@cityofsancarlos.org)

Questions regarding this request for proposals (RFP) should be directed in writing via email by **3:00 p.m. PDT on April 15, 2025**, to:

Quinne Woolley  
Management Analyst, City of San Carlos  
[gwoolley@cityofsancarlos.org](mailto:gwoolley@cityofsancarlos.org)





# CITY OF SAN CARLOS Request for Proposals

## 1. Introduction

The City of San Carlos (“the City”) is seeking proposals from qualified election campaign consultants (“Consultant”) to submit proposals to provide project management, consulting services, and subcontracted election polling services for a local ballot measure (general obligation bond or parcel tax) in the November 2026 municipal election. The Consultant will assist the City from beginning to end of the entire revenue ballot measure cycle, with effective communication throughout with all interested stakeholders.

## 2. Background

The City of San Carlos, known as the “City of Good Living,” is located halfway between San Francisco and San Jose, covers five and a half square miles, and has about 30,000 residents. The City strikes the rare balance between small town charm and big city access.

The City is governed by a five-member City Council and an appointed City Manager and City Attorney. The City Council appoints members of the public to various commissions and committees to provide advice and support to the Council. San Carlans are actively involved in a wide range of civic affairs and the City encourages public participation.

The City Council values transparency, open communication, and feedback from the community. The City conducts a community satisfaction survey every two years, and each survey has indicated overall satisfaction with the City's performance and efforts at communicating with the community. Community engagement is a priority of the City. To learn more about City of San Carlos, visit [cityofsancarlos.org](http://cityofsancarlos.org).

## 3. Project Overview

In 2022, the City of San Carlos initiated the Downtown Specific Plan and Streetscape Master Plan project to improve the vibrancy of the downtown, provide an enhanced pedestrian experience, create safer bike routes, increase the number of visitors, improve the overall shopping and dining experience for visitors, and create more space for downtown programming and activities. Design engineering drawings for the first phase of these improvements, located along the 700 block of Laurel Street, are currently underway. The City expects to break ground on a small portion of the first phase, which includes improvements to Harrington Park, in November 2025.

The total cost of the core downtown improvements is estimated to be \$65,000,000. To implement the project, the City needs to identify a new revenue stream that will fund \$20,000,000 of the \$65,000,000.



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More project information is available at [sancarlosdowntownplan.com](http://sancarlosdowntownplan.com).

### 4. Scope of Work

Project tasks shall include, but are not necessarily limited to, the scope of work described below. If the Consultant feels that additional tasks are warranted, they must be clearly identified in the firm's proposal. Firms responding to this RFP shall be prepared to deliver services and perform the work necessary to provide the services immediately upon award of contract. The project consists of furnishing all labor, materials, supervision, and travel necessary to deliver the services outlined below:

1. Management of election polling consultant and surveys – The Consultant will hire and partner with a polling consultant(s). The Consultant will include the cost of the polling consultant in this proposal. The election polling consultant will design and conduct at least two surveys to understand the community's perspectives on a revenue measure: one in June 2025 and a second at a time to be determined. The election polling consultant will: develop and conduct hybrid online and phone surveys; conduct pretesting of the surveys; train interviewing personnel; develop a recruitment message to survey takers; develop a listed sample of San Carlos voters; summarize and present the survey data results and strategic recommendations in reports and presentations to staff and the City Council; and provide post-survey consulting as needed by the City.
2. Development of a revenue ballot measure – Work with councilmembers, staff, and other consultants to determine the amount and type of revenue measure to pursue. Work with the legal consultant to provide input on the revenue measure, ordinance, reports, and resolutions.

The Consultant will be engaged in the review and adoption process of the measure by the City Council and will adhere to all public hearing requirements. The Consultant will also coordinate with all stakeholders including, but not limited to, the City Council, City Manager, City Attorney, and other City consultants, as needed.

3. Community outreach plan – In addition to managing the measure and ordinance development processes, the Consultant will guide the City through a comprehensive public education and marketing plan and execute this plan within the community based on the polling results.

The consultant will need to be well versed in mail, website, social media, in-person engagement, and all other outreach methods to lead the City through an educational campaign.



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4. Overall project management – Develop and manage a master project schedule from project kickoff through Election Day and ensure coordination across all working groups\*. The City will provide the Consultant with access to City staff's availability to support effective scheduling and project management.

As the lead project manager, the Consultant will attend all meetings, both in-person and virtual, including council meetings, community engagement meetings, stakeholder meetings, councilmember subcommittee meetings, internal team meetings, and any other meetings required.

\*Working groups may include: (a) a councilmember subcommittee consisting of two councilmembers, City staff, and consultants; (b) an internal staff and Project consultants; (c) a community outreach team; and (d) any additional groups deemed necessary. A summary of all known project team members is provided below.

### Project Team Members

In addition to the campaign consultant and their election polling services provider, the project team will at least consist of:

1. Two City of San Carlos elected councilmembers
2. Nine City of San Carlos Staff
  - a. Administrative Services Director
  - b. Advance Planning Manager
  - c. Assistant City Manager
  - d. City Attorney
  - e. City Manager
  - f. Communications Manager
  - g. Community Development Director
  - h. Financial Services Manager
  - i. Management Analyst
3. Two Consultants
  - a. Financial Consultant
  - b. Bond Counsel

## 5. Proposal Submission Requirements

The proposals should include the following, along with any additional information:

1. Consultant Profile – Include a brief company history and location.
2. Applicable Experience – Describe Consultant's experience with the full ballot measure service cycle. List a minimum of three specific examples of projects where the Consultant



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has performed services of similar size, scope, and complexity. Each example should show experience with local governments providing ballot measure polling and outreach consultant services.

3. Staff Qualifications and Experience – The proposal should identify a project manager as well as any other staff who would be assigned to the project. List the qualifications and experience for each principal staff member and include recent polling and outreach experience. Indicate how the quality of staff over the term of the agreement will be assured.
4. Polling and Public Education Strategy – The proposal should set forth a work plan, including an explanation of the polling methodology for the surveys, public education, and outreach strategy, and all services as described in this solicitation.
5. Timeline Proposal – The Consultant should submit a proposed project timeline outlining key phases and milestones. This should include target dates for designing and launching surveys, presenting findings to the City Council, conducting education and outreach efforts, and completing other essential components
6. References – Provide three references for projects similar in size, scope, and complexity. Include the name of the reference, their email, phone number, a description of the service performed, and the date of project completion.
7. Modifications to Scope of Work – Identify any suggested modification(s) to the scope of work listed above.
8. Fee Proposal – Provide a not-to-exceed fee proposal which assumes the above scope of work, with any detailed exclusions and inclusions. Please also include the following:
  - a. Incremental Costs – Provide proposed incremental costs for any optional services or for any other variability in services.
  - b. Ancillary Costs – Identify any potential ancillary costs of which the City should be aware.
9. Acknowledgement of City's standard Professional Services Agreement ([Attachment A](#)) – Consultant must either acknowledge that the City's standard professional services agreement is acceptable as written and that the necessary insurance and other documents will be provided as required, or the Consultant must submit "redlined" changes to the professional services agreement.



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The proposed agreement is included in Attachment A. “Redlined” changes and comments using Microsoft Office’s “track changes” feature are expected with the Consultant’s final Proposal Submission Requirements. The City strongly encourages consultants to share the Service Agreement with their legal departments for review and comment immediately upon receipt of this RFP.

10. Signed and completed Levine Act Disclosure ([Attachment B](#))

### 6. RFP Schedule

The schedule below is an estimate and may be adjusted as necessary.

|   |                                  |
|---|----------------------------------|
| City issues RFP   | April 8, 2025                    |
| Deadline for emailing written questions to <a href="mailto:gwoolley@cityofsancarlos.org">gwoolley@cityofsancarlos.org</a> | April 15, 2025, by 3:00 p.m. PDT |
| Deadline for the City to post answers to all questions on the <a href="#">RFP webpage</a>                                 | April 18, 2025, by 5:00 p.m. PDT |
| Deadline for emailing* proposals to <a href="mailto:gwoolley@cityofsancarlos.org">gwoolley@cityofsancarlos.org</a>        | April 28, 2025 by 3:00 p.m. PDT  |
| Proposal review and selection of consultants to invite for interviews   | May 5, 2025 by 5:00 p.m. PDT     |
| Interviews  | Week of May 12, 2025             |
| Consultant selection and contract completion  | Week of May 19, 2025             |
| Contract effective date   | May 30, 2025                     |

\*The City is not responsible for proposals that are delinquent, lost, mismarked, or sent to an email address or another address other than provided above. The City reserves the right to reject any or all proposals or to accept the proposal that in its sole judgment is in the best interest of the City of San Carlos.

### 7. Consultant Selection

Evaluation considerations will include the following:

1. Responsiveness of the proposal to the ten Proposal Submission Requirements listed above.
2. Clear indication of understanding of the work to be performed and demonstration of intent and ability to perform the work.
3. Professional qualifications and technical expertise.
4. Experience and track record conducting similar work for similar cities.



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### 5. Proposed cost to provide the requested services.

The City retains sole discretion to evaluate submittals and may make an award to the consultant the City deems to be most responsive to the RFP. Receipt of submittals in response to its request for proposals does not obligate the City in any way to engage any consultant, and the City reserves the right to reject any or all submittals, wholly or in part, at any time, without penalty. The City shall retain the right to abandon the RFP and selection process at any time prior to the actual execution of a contract with a consultant and the City shall bear no financial or other responsibility in the event of such abandonment. The City reserves the right to negotiate all final terms and conditions of any agreements entered into.

## 8. Submission Instructions

Submit an electronic copy of the proposal signed by the firm's authorized agent by email to Quinne Woolley, Management Analyst ([qwoolley@cityofsancarlos.org](mailto:qwoolley@cityofsancarlos.org)) with the subject, "RFP – Election Campaign Consultant" no later than April 28, 2025 at 3:00 p.m. The proposal must be received before the specified time. Late proposals will not be considered. A notification of receipt will be emailed to all submitters.

Any questions pertaining to this RFP should be directed to Quinne Woolley, Management Analyst, at [qwoolley@cityofsancarlos.org](mailto:qwoolley@cityofsancarlos.org) by April 15, 2025 at 3:00 p.m. Responses to all questions will be published to the [RFP webpage](#) by April 18, 2025 at 5:00 p.m.

## 9. General Requirements

1. All costs incurred during submittal preparation or in any way associated with the Consultant's preparations, submission, presentation, or oral interview shall be the sole responsibility of the Consultant.
2. If awarded a contract, the Consultant shall maintain insurance coverage, including worker's compensation, reflecting the minimum amounts and conditions specified by the City during the entire period of engagement. Detailed insurance requirements are listed in the Professional Services Agreement (Attachment A).
3. If awarded a contract, the Consultant will be required to be licensed in accordance with the City of San Carlos [Business License Ordinance of the Municipal Code](#).
4. Consultants are liable for all errors or omissions contained in their proposals.
5. The proposal must not be marked as confidential or proprietary. Information in proposals shall become public property and subject to disclosure laws. All proposals shall become the property of the City. The City reserves the right to make use of any information or ideas in the Proposals. By submitting a proposal, the Consultant represents that it has



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thoroughly examined and become familiar with the work required under this RFP and that it is capable of providing and performing quality work to achieve the City's objectives.

6. Proposals must be valid for a period of 120 calendar days from the closing date.
7. Pre-contractual expenses are defined as expenses incurred by the Consultant in: preparing its proposal in response to this RFP; submitting that proposal to the City; negotiating with the City any matter related to the Consultant's proposal; and any other expenses incurred by the proposer prior to the date of award and execution, if any, of the Agreement. The City shall not, in any event, be liable for any pre-contractual expenses incurred by Consultant in the preparation of their proposal.
8. Each consultant must submit its proposal in strict accordance with all requirements of this RFP. Deviations, clarifications, and/or exceptions must be clearly identified and listed separately as alternative items for the City's consideration.
9. After the closing date, evaluation and proposal clarification will commence, all of which will be conducted by the consultant selection team. The consultant selection team will make subsequent recommendations of approval to the City Council.
10. Consultants judged most responsive to the City's requirements may be invited for an interview. No consultant shall be allowed to alter or amend its proposal through the use of the interview process.
11. Where two or more consultants desire to submit a single proposal in response to this RFP, they should do so on a prime/sub-contractor basis rather than as a joint venture. The City intends to contract with a single firm and not with multiple firms doing business as a joint venture.
12. Firms intending to pursue this proposal in a "prime/sub-contractor" basis must identify any portion of the scope of work that will be subcontracted. Include the subcontractor's qualifications and key personnel, telephone number and contact person. The City reserves the right to approve or reject all consultants or internal staff performing consulting services, proposed by the consultant during or after the consultant review and selection process.
13. The Consultant warrants and represents that it presently has no interest and agrees that it will not acquire any interest which would present a conflict of interest under California Government Code Sections 1090 et seq., or Sections 87100 et seq., during the performance of services under any Agreement awarded. The Consultant further covenants that it will not knowingly employ any person having such an interest in the performance of any Agreement awarded. Violation of this provision may result in any Agreement awarded being deemed void and unenforceable.

### Attachments

- A. [Professional Services Agreement](#)
- B. [Levine Act Disclosure](#)

----- End of RFP -----