



CITY OF GREAT FALL, MONTANA
REQUEST FOR PROPOSALS – BALLOT MEASURE POLLING
AND OUTREACH CONSULTANT SERVICES

Issue Date: May 13, 2024

PART I – SPECIFICATIONS

A. INTRODUCTION

The City of Great Falls Montana (hereinafter referred to as “the City”) is requesting proposals from qualified firms (hereinafter referred to as “Firm”) for professional services to provide polling services pertaining to Public Safety services in Great Falls.

Public safety services encompass a broad range of activities and measures provided by city government to ensure the protection and well-being of the public. City departments primarily involved with public safety services include (not in any priority) Municipal Court, City Attorney’s Office, Great Falls Police Department and Great Falls Fire/Rescue.

To enhance its public safety continuum, the City Commission asked voters to consider additional funding via a public safety levy and bond in November 2023. Both ballot initiatives failed. The Commission may seek another levy ballot initiative within two years.

In November 2023, the voters spoke on a request to fund Fire, Police, Municipal Court, and Legal Departments. The total operational request of the voters was \$10.7 million dollars and a bond request \$21.1 million, which includes an additional fire station. The ballot election is summarized below:

Number of registered voters in the City of Great Falls 33,000. **Total Levy/Bond votes cast: 14,715**

Levy Vote

Opposed 9,095

Support 5,620

Bond Vote

Opposed 7,925

Support 6,726

The only additional public safety investment made by Great Falls taxpayers was in 1969 when the voters supported a bond to construct four new fire stations. In 2009, the City Commission placed a ballot measure seeking funding for Fire and Police before the voters in the amount of \$1.8 million. The measure also failed.

At this time, the Great Falls City Commission has not determined to place any ballot proposals _____

forward for voter consideration this calendar year. The City Commission did however, empanel a Public Safety Advisory Committee. This panel is similar to a prior panel called the Great Falls Crime Task Force empaneled in 2021 (<https://greatfallsmt.net/citycommission/great-falls-crime-task-force>).

The City Commission will evaluate community priorities, review/adopt FY2025 budget in June 2024, and seek input from the Public Safety Advisory Committee. Dependent on budget outcomes and Task Force recommendations, the Commission expects to evaluate options for a future ballot question.

During the proposal evaluation process, the City reserves the right to request additional information or clarification from proposers, or to allow corrections of errors or omissions. Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposal, unless clearly and specifically noted in the proposal firm bidder selected.

To be considered, proposals must be received by the Great Falls City Clerk no later than 5:00 p.m. Wednesday, June 19, 2024. Proposals will be accepted via email and mail. If submitting via mail, a flash drive containing the full electronic proposal must be submitted with the hard copy. Proposals submitted via facsimile will not be accepted.

It is anticipated that the selected firm will be notified in the first part of July 2024. An electronic version of this request for proposal may be found on the City's website: <https://greatfallsmt.net/rfps>.

All questions related to this Request for Proposal must be submitted in writing via email or received via mail by Wednesday, May 22, 2024 to:

City Clerk, Lisa Kunz
City of Great Falls
P.O. Box 5021
Great Falls, Montana 59403
lkunz@greatfallsmt.net

Any RFP revisions will be made in the form of an addendum and will be available on the City's website: <https://greatfallsmt.net/rfps>. It is the responsibility of respondent to check the City's website for posted addenda.

II. DESCRIPTION OF THE CITY

The City of Great Falls is located in Cascade County, in the north-central region of Montana. Cascade County is bordered on the west by the Rocky Mountains, to the southeast by the Little Belt and Highwood Mountains, and by the Hi-line area to the north. This vicinity of Montana, with its grasslands and mesas, is often referred to as the transitional area between the Great Plains and the Rocky Mountains. Great Falls is the largest City in this eleven county region of Montana, ever increasingly serving as a regional hub for military, medical, agricultural, retail, and transportation for the region.

Geographically, the City of Great Falls is nestled in the confluence of the Sun and Missouri Rivers, where the “great falls of the Missouri” were first chronicled in the journals of Lewis and Clark. It was this location that inspired Paris Gibson in 1882 to design and lay-out an “ideal” City for commerce, industry and family life. Gibson’s original design is the foundation for much of the City’s growth, development pattern, and amenities. In recent years, there has been additional development in urban renewal areas, the downtown, and interest in housing developing along the Missouri River.

Today the City of Great Falls is the urban center of Cascade County and the north-central Montana region, representing about 72% of the County’s population. The City of Great Falls shares many of the economic and demographic characteristics of Cascade County, yet the City’s urban characteristics create distinct differences.

The City’s adopted budget for FY 2023/24 is \$163 million. The General Fund budget is \$37 million.



III. SCOPE OF WORK TO BE PERFORMED

- A. Services to be Performed by Consultant
 - 1. The City seeks proposals for polling services pertaining to a future levy and bond measure. The City desires to better understand citizen opinion, assess the likelihood of success with different approaches and taxation amounts and ensure voters are accurately informed and understand the outcome of their vote(s) associated with the ballot measures.
 - 2. Develop a survey questionnaire and conduct a statistically rigorous online survey and/or telephone poll targeting residents to gauge community preferences concerning a proposed public safety levy and bond. Present statistical findings to enable informed conclusions and recommendations, including insights on sample size, confidence level, and margin of error.
- B. The Firm will be expected to use their expertise to determine the type, nature, scope and framing of questions that would assist the City with determining the will of the voter regarding public safety services. The City Commission is generally interested in learning from the voter, the following (but not limited to):
 - 1. Do voters believe that public safety services are adequate?
 - 2. What areas of Public Safety do they have confidence in? Which areas do they feel are inadequate?
 - 3. Did they vote in the last ballot election? Why? Why not?
 - 4. How did they vote and why?
 - 5. Which public safety departments would the voters be willing to support?
 - 6. What information would voters need to make a well informed decision?
 - 7. What would voters be willing to pay for additional support to specific areas?
- C. A recommendation from the Firm regarding timing considerations of a poll and the timing of a potential levy/bond ballot request is requested.
- D. Timeline Requirements
 - 1. Consultants shall initiate work within 30 days of contract award. The City seeks to complete the polling and a portion of the public outreach by December 31, 2024 to provide ample time to share the results with the City Commission.
- E. Reporting and Communication
 - 1. The consultant will meet initially with the City Manager, City Attorney, and

Finance Officer to design the survey and questions as well as meet regularly during the process to discuss issues, concerns, preliminary findings, and recommendations.

2. The consultant will provide regular updates to the City regarding progress on the analysis and recommendations and request any additional information or direct need to complete the project on time and within the contract budget.
 3. Prior to issuing the first milestone report, the consultant will meet with the City Manager and public safety department heads to review the draft report and make recommendations to be presented to the City Commission.
 4. Present data and recommendations to the City Commission.
- F. Other Considerations
1. All working papers, reports, and records relating to the work performed under the Professional Services Agreement must be retained, at the consultant's expense, for a minimum of five (5) years, unless the Firm is notified in writing by the City of the need to extend the retention period.

IV. BASIS FOR COMPENSATION

- A. The City will pay the consultant for the services described in Part I, Section III (Scope of Work to be Performed) that do not exceed the amount contained within an executed Professional Services Agreement between the City and the Firm. For additional services required after the inception of the Agreement, written approval by the City shall be required in advance of such services being rendered. The fee for such services shall be paid based on the consultant's quoted hourly rates.

V. ADDITIONAL PROVISIONS

- A. Upon notice of intent to award contract, the successful consultant shall enter into a Professional Services Agreement with the City of Great Falls subject to approval by the Great Falls City Commission.
- B. No officer, agent, or employee of the City and no member of its governing bodies shall have any financial interest, direct or indirect, in this agreement or the proceeds thereof. No officer, agent, or employee of the Firm shall serve on a City committee or hold any such position which is incompatible with such person's duties or obligations or other relationship to this agreement.
- C. Time is of the essence in each and all provisions of the Agreement.

VI. SPECIAL TERMS AND CONDITIONS

- A. Invoices received from the Firm will be approved by the Finance Director and processed within thirty (30) days from receipt.
- B. The City is not liable for any pre-contractual expenses incurred by any bidder. In addition, no bidder shall include any such expenses as part of the price proposed to conduct the work.
- C. The City reserves the right to withdraw the RFP at any time without prior notice. Further, the City makes no representations that any agreement will be awarded to any bidder responding to this RFP. The City expressly reserves the right to postpone action regarding this RFP for its own convenience and to reject any and all proposals in response to this RFP without indicating reasons for such rejection.
- D. The City is not responsible for oral statements made by any of its employees or agents concerning this RFP. If the bidder requires specific information, the bidder must make the request in writing as instructed in the RFP.
- E. All responses to the RFP shall become the property of the City and a matter of public record. Responders must identify all copyrighted material, trade secrets or other proprietary information that the responder claims are exempt from disclosure by the Montana Code Annotated. In the event a responder claims such exemption, the responder must state in the response that: "The responder will indemnify the City and hold it harmless from any claim or liability and defend any action brought against the City for its refusal to disclose copyrighted material, trade secrets, or other proprietary information to any person making a request thereof." Failure to include such a statement shall constitute waiver of the responder's right to exemption from disclosure and authority for the City to provide a copy of the proposal or any part thereof to the requestor.
- F. The individual(s) preparing and submitting the proposal must state they possess the authority to bind the Firm to the terms of the RFP.
- G. All questions regarding this RFP should be made in writing and emailed to lkunz@greatfallsmt.net by 5:00 p.m. on May 22, 2024.

PART 2 – PROPOSAL REQUIREMENTS AND INFORMATION

I. PROPOSAL PROCESS AND CALENDAR

A. Distribution of Proposals

Request for Proposals shall be available on the City of Great Falls website: <https://greatfallsmt.net/rfps> on May 13, 2024.

B. Proposal Submission

Proposals for the City of Great Falls Polling Services must be received no later than 5:00 p.m. on June 19, 2024. Proposals will be accepted via email and mail. If submitting via mail, a flash drive containing the full electronic proposal must be submitted with the hard copy. Proposals submitted via facsimile will not be accepted. Proposals must be submitted to the following:

City Clerk, Lisa Kunz
City of Great Falls
P.O. Box 5021
Great Falls, Montana 59403
lkunz@greatfallsmt.net

Proposals must contain a cover page with the following information: firm's name, mailing address, physical address, and RFP title. Late or incomplete proposals will not be considered.

C. Proposal Review and Notification

An internal committee established by the City Manager will review, evaluate, and recommend proposals to the City Commission.

D. Interviews

The City may schedule interviews with finalists if necessary. Firms selected for interviews may be requested to prepare a short presentation for the review committee.

E. Final Selection and Notification

The City anticipates making a final selection by mid to late July, 2024.

II. PROPOSAL REQUIREMENTS

A. Firm Qualifications and Experience

The proposal should state the size of the Firm, the size of the Firm's staff, the location of the office from which the work on this engagement is to be performed. For the Firm's office assigned responsibility for the polling and public outreach, list the most significant engagements (minimum of 3, maximum of 5) performed in the last five (5) years that are similar in organizational type, size and complexity to the engagement described in this request for proposal. These engagements should show experience with local governments providing ballot measure polling and outreach consultant services. Indicate the scope of work, date engagement partners, total hours, and the name and telephone number of the principal client contact and, if available, a link to the final published report.

Provide data that demonstrates success rate of past polling endeavors. Statistical data should be included that demonstrates polling results and predictions versus actual results in the elections.

B. Partner, Supervisory, and Staff Qualifications and Experience

The Firm shall identify the principal supervisory and management staff, including engagement partners, managers, other supervisors, and specialists, who would be assigned to the project. The Firm should also provide information on direct polling and outreach experience, including the scope of services requested by the City, of each person, and information on relevant continuing professional education for the past three (3) years and membership in professional organizations relevant to the performance of these services.

The Firm should provide as much information as possible, including resumes, regarding the number, qualifications, experience, and training of the specific staff to be assigned to this agreement. The Firm should also indicate how the quality of staff over the term of the agreement will be assured.

Engagement partners, managers, other supervisory staff, and specialists may be changed if those personnel leave the Firm, are promoted, or are assigned to another office. These personnel may also be changed for other reasons with the express prior written permission of the City of Great Falls. However, in either case, the City of Great Falls reserves the right to approve or reject replacements. This shall also apply to consultants and firm specialists mentioned in response to this request for proposal.

Other personnel may be changed at the discretion of the Firm provided that replacements have substantially the same or better qualifications or experience and there is continuity of key staff to ensure an efficient process.

C. Specific Polling

The proposal should set forth a work plan, including an explanation of the polling methodology to be followed to perform the services required in Part I, Section III of this request for proposal.

D. Total All-Inclusive Maximum Price

The proposal should contain all pricing information relative to performing the polling and outreach services as described in this request for proposal. The total all-inclusive maximum price to be proposed is to contain all direct and indirect costs, including all out-of-pocket and travel expenses.

E. Rates by Partner, Supervisor, and Staff Level Times Hours Anticipated for Each

The proposal should include a schedule of professional fees and expenses, as presented in the format shown in Appendix B, which includes the proposed total all-inclusive maximum

price.

F. Ownership of City-Related Documents

All property rights, including publication rights of all reports produced by the Firm in connection with services performed under this agreement shall be vested in the City of Great Falls. The proposer selected shall not publish or release any of the results of its examinations without the express written permission of the City of Great Falls.

G. Acceptance of Proposal Contents

After a Firm is selected by the City, the contents of the submitted proposal shall become part of the resulting Professional Services Agreement. The successful bidder will be required to execute a standard Professional Services Agreement with the City, an example of which is attached as Appendix C. Failure of the Firm to agree to include the proposal as part of the contractual agreement may result in cancellation of the award. The City reserves the right to reject those parts of the proposal that do not meet with the approval of the City.

H. Acceptance or Rejection and Negotiation of Proposals

The City reserves the right to reject any or all proposals, to waive non-material irregularities or information in the request for proposal, and to accept or reject any item or combination of items. By requesting proposals, the City is not obligated to award a contract or to pay expenses of the proposing Firms in connection with the preparation or submission of a proposal. All requests for proposals received by the City will remain open, valid, and subject to acceptance for a period of three months.

III. EVALUATION PROCESS

The proposals for the City's polling services will be evaluated by a committee selected by the City Manager, City Attorney, and Finance Officer. Proposers may be required to make oral presentations as a supplement to their proposals. These presentations would only be held subsequent to the receipt of the proposals and will be part of the evaluation/interview process to determine qualifications of the firm. The City Manager will schedule a time and location in the City of Great Falls for each oral presentation that it requests. Should a proposer refuse to honor the request for an oral presentation or interview, it may result in the rejection of the proposal by the City.

Evaluation considerations will include the following:

- A. Responsiveness of the proposal in clearly stating the understanding of the work to be performed and in demonstrating the intention and ability to perform the work.

- B. Consultant's experience in conducting polling and public outreach for cities of a similar nature, size, and complexity, and the consultant's commitment to maintaining technical expertise in the municipal election's environment.
- C. Technical experience and professional qualifications of the team. The number of key and supervisory personnel who will directly participate in the polling and public outreach.
- D. Size and structure of the Firm's office from which the work is to be done and continuity in staff. The City is looking for a highly qualified team that is able to meet the due dates specified in this document.
- E. Cost. Although a significant factor, cost will not be the primary factor in the selection of a firm.
- F. Consultant's experience in complying with applicable federal and state regulations relating to non-discrimination and equal employment opportunity.

IV. FORMAT AND CONTENT OF PROPOSAL

A. Title Page

The title page should include the request for proposal subject, the name of the proposer's firm, local address, telephone number, name of contact person, and date.

B. Table of Contents

Include a clear identification of the material by section and by page number.

C. Letter of Transmittal

1. State whether the Firm is local, national, or international.
2. Give the location of the office from which the work is to be done and the number of partners, managers, supervisors, seniors, and other professional staff employed at that office.
3. Describe the range of activities performed by the local office such.
4. Describe the local office's polling analysis capabilities, including the number and classifications of personnel skilled in statistical analysis who will work on the polling.
5. Describe the local office's public outreach format and techniques for attendance, engagement, and dissemination of information.

6. Describe the local office's recent polling and public outreach experiences with mid-size local government agencies.

D. Polling and Outreach Team

1. Describe the composition of the team, including staff from other than the local office, and consultants. Include resumes of each personnel identified.
2. Identify the supervisors and consultants who will work on the polling and public outreach and include resumes of each personnel identified.
3. Provide qualifications, relevant experience, and training of the specific staff to be assigned to this agreement. The Firm should also indicate how the quality of staff over the term of the agreement will be assured.

E. References

List five municipal (City or County clients) for whom similar or comparable services have been performed. Include the name, mailing address, and telephone number of their principal representative, a detailed description of the work performed, and the dates services were provided.

F. Scope and Provisions

Describe the scope of the required services to be provided and outline a plan on how such services will be implemented. Please include depth of work, staffing, and time estimates. Proposers should list all reports that are to be issued, the points to be addressed by reports, parameters of recommendations, and the estimated completion dates.

G. Cost Data

Indicate the total hours and hourly rates by staff classification and the resulting all-inclusive maximum fee (not to exceed total) for which the requested work will be done for each of the specific deliverables identified in this Request for Proposal. Fees must include all anticipated costs including travel, per diem, and out-of-pocket expenses.

H. Additional Data

Data not specifically requested should not appear in the foregoing sections, however any additional information considered essential to the proposal may be presented in this section.

APPENDIX A

RFP Process

Issuance Date and available on the City of Great Falls website	May 13, 2024
Questions about the RFP due by	May 22, 2024
Received no later (No later than 5:00 p.m.)	June 19, 2024
Selected firm will be notified by	early July, 2024
Final selection by	mid to late July, 2024

Work Process

Consultants shall initiate work	within 30 days from award
Complete polling	December 31, 2024

APPENDIX B

Schedule of Professional Fees and Expenses to Support the
Total All-Inclusive Maximum Price

PERSONNEL	HOURS	STANDARD HOURLY RATES	QUOTED HOURLY RATES	TOTAL
Partner		\$	\$	\$
Manager		\$	\$	\$
Supervisory Staff		\$	\$	\$
Other (specify)		\$	\$	\$
			Subtotal	\$
			Out-of-Pocket Expenses	\$
			All-Inclusive Maximum Total Price	\$

APPENDIX C

(PLEASE SEE ATTACHED CITY OF GREAT FALLS'
STANDARD "PROFESSIONAL SERVICES AGREEMENT")