



# City of Richmond Sole Source Justification

**THIS FORM MUST BE COMPLETED AND APPROVED PRIOR TO ANY PURCHASE**

**Contact the Purchasing Division and discuss your rationale before completing this form. If Purchasing can help you make this a competitive purchase, then this form will not be required.**

Attach this completed/approved form to requisitions when competitive quotes/bids/proposals are not solicited. (Required for requisitions > \$3,000)

**Requested Sole Source Supplier:**

**Company Name:** Matrix Consulting Group, LTD.      **Contact Name:** Richard P. Brady

**Address:** 1650 S. Amphlett Blvd., Suite 213

**City:** San Mateo      **State:** CA      **Zip Code:** 94101

**Phone Number** (650) 858-0507      **E-Mail** rbrady@matrixcg.net

**Duration of Contract:** \_\_\_\_\_

**Estimated Cost:** \$ 39,500      **Funding Source (Account String)** TBD - County Reimbursement

**Is the product/service IT related?** Yes \_\_\_\_\_ No  **If Yes, please attach the approved IT Authorization Form**

**For Product: Is the recommended company the manufacturer of the product?** Yes \_\_\_\_\_ No \_\_\_\_\_

**For Product: Does the manufacturer sell the item(s) through distributors?** Yes \_\_\_\_\_ No \_\_\_\_\_

**Description of Product or Service:**

*Describe the full scope of work or service contemplated including installation if required; items should include brand, model and part number if applicable; (if additional space is needed, include them in a separate page)*

Matrix Consulting Group will work with Project Manager or designees to produce a report that provides a thorough examination and feasibility study regarding the Richmond Fire Department's intent to transition into an Advanced Life Support (ALS) agency.

**Sole Source Rationale:** PLEASE ANSWER ALL THE FOLLOWING QUESTIONS: Explain why the recommended company is the only company that can meet the requirement. Address the following: Are there any other companies who can do this job? What condition (e.g. technological superiority, or performance risks, etc.) exists so that the recommended company has a significant advantage over any other company who can do this job? It is important to sufficiently address the key reason for awarding an order/contract without soliciting competitive bids. The rationale must be clear and convincing, avoiding generalities and unsupported conclusions.

The department intends to sole source the ALS/Paramedic First Responder Feasibility Study to Matrix Consulting Group since the firm already did an in-depth Richmond Emergency Services Data Analysis and Report. It'll be in the best interest of the City to sole source this study since it will reduce the lead time, cost, and duplication of any baseline studies that need to be conducted to initiate the project.

*(if additional space is needed, include them in a separate page)*

**Complete the following checklist**

A specific contractor is the only source of the required item because (check all that apply):

- The required items are **proprietary to the Contractor**, and contractor solely transacts (sells) direct to the customer. (There are no dealers or distributors for contractor).
- The required items are **proprietary to the Contractor**, and **contractor does not sell direct to the customer**. Contractor solely distributes the item or service through only one dealer or distributor in the United States. (There are no dealers or distributors for contractor).

**Note:** If item or service is available from more than one source, the item or service may be treated as proprietary, but must be competitively solicited from multiple (two or more) sources.

- A specific item is needed:
  - To be compatible or interchangeable with existing hardware
  - As spare or replacement hardware  For the repair or modification of existing hardware
- Federal or state grant names vendor as condition of funding. (Attach copy of grant that names vendor)
- There is a **substantial risk** in contracting with any other contractor, (e.g., only one contractor has been successful to date in implementing a difficult manufacturing process or the **services sought**). *In a brief explanation, provide supporting evidence of why other contractors are considered to be unable to overcome the substantial risk.*

- Continuation of prior Work** – Additional item, service or work required, but not known to have been needed when the original order was placed with vendor, and it is not feasible or practicable to contract separately for the additional need. *Provide brief explanation and supporting evidence.*

The City directed Matrix Consulting Group to conduct Emergency Services Data Analysis and Report on March 15, 2022. The Matrix Consulting Group published their report on March 6, 2023. Since Matrix Consulting Group has already an understanding of the department's organization and emergency services system dynamics/services, it will be advantageous for the City to have the firm build on the initial findings to save lead time, cost, and duplication of work.

*(if additional space is needed, include them in a separate page)*

I acknowledge the City's requirements for soliciting competitive quotes/bids for purchases over \$3,000.00 and the criteria for justification for Sole Source purchases. I have gathered the required information, have made a concerted effort to review comparable/equal equipment/services (e.g., market research), and further affirm that there is no conflict of interest involved in the selection made.

Department: Fire

Requester Name and Title: Den Mark Marcelo, Admin Services Coordinator

*Note: Requester must be able to defend this justification.*

Date: 2-22-2024

Phone: 510.397.8041


Department Director (Print) MICHAEL E. SMITH

(Sign) Michael Smith

Date: 2-22-2024

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**Submit completed form to the Purchasing Division (Prior to submission to City Manager)**

**Finance Director:**

APPROVED: 

DATE: 2/29/2024

NOT APPROVED: \_\_\_\_\_

COMMENTS:

\_\_\_\_\_  
City Manager  
(Under \$10,000.00)

\_\_\_\_\_  
City Clerk Attesting to Council Approval  
(Over \$10,000.00) (Copy of Minutes may be substituted)

**Note: Richmond Municipal Code Section 2.52.326 Sole Source Procurement requires final approval by the City Manager and/or City Council. Sole Source must be approved by Finance Director, PRIOR to Council Approval.**

**PROCEDURE**

Sole Source purchase/service are exceptions to the normal bidding process and require a detailed justification. In processing Sole Source requests for supplies, services and/or equipment, the Purchasing Division adheres to and is governed by the principles set forth in City of Richmond Municipal Code Section 2.52.326 Sole Source Procurement.

If you are requesting a particular vendor, brand or product, you must make this fact clear on your Sole Source form. Your request will then be restrictive and non-competitive, and will fall into a sole source category. If the sole source justification is approved, the requisition can be expedited without the normal bidding requirements.

Such a request should not be made unless you are confident that your request is reasonable and appropriately justified to meet the City's requirements and withstand any possible audit. The City's requirements and the format for submitting such requests are contained herein. Sole Source form must be signed by authorized department representative(s). The certification will remain on file for audit purposes.

The following factors **DO NOT** apply to sole source requests and should not be included in your sole source justification. They will not be considered and only tend to confuse the evaluation process.

1. Personal preference for product or vendor.
2. Cost, vendor performance, and local service (these are generally considered award factors in competitive bidding).
3. Features which exceed the minimum department requirements.



**Proposal to Conduct an ALS/Paramedic First  
Responder Feasibility Study**

**RICHMOND, CALIFORNIA**

February 20, 2024

**matrix**   
consulting group

## Table of Contents

	Letter of Transmittal	i
A	Firm and Project Team	1
B	Workplan and Timeline	3
C	Project Cost	10



February 20, 2024

Michael Smith, Interim Fire Chief  
Richmond Fire Department  
440 Civic Center Plaza  
Richmond, CA 94804

Dear Chief Smith:

The Matrix Consulting Group is pleased to provide you with our proposal to conduct an ALS/Paramedic First Responder Feasibility Study for the Richmond Fire Department. This proposal is based on our telephone conversation, our recent experience working with the City and Fire Department and our experience working with hundreds of fire departments in California and across the United States. Our firm was founded in 2003 and members of our team have over 30 years' experience in consulting and fire service management.

Our team's fire and emergency medical service analytical experience includes over 400 projects throughout the country, including the recent Emergency Services Study of the Richmond Police and Fire Departments in 2023. Sample assignments include (with California projects in **bold**):

Albany, California	Grants Pass, Oregon	Pacific Grove, California
Atherton, California	Huntington Beach, California	Palm Desert, California
Barnstable, Massachusetts	La Quinta, California	Placer County, California
Bellingham, Washington	Los Banos, California	Red Bluff, California
<b>Big Bear, California</b>	<b>Mercer County, California</b>	Reno, Nevada
Butte County, California	Milwaukee, Wisconsin	<b>Sebastopol, California</b>
Chelsea, Massachusetts	<b>Monrovia, California</b>	Vacaville, California
<b>Dinuba, California</b>	<b>Monterey, California</b>	Vernon, California
<b>Dixon, California</b>	<b>Napa, California</b>	West Sacramento, California

We are also conducting fire studies in **Morro Bay** and **Napa County (CA)**.

The following points characterize our approach to conducting fire staffing studies:

- All staff for our proposed team are extremely experienced, having themselves conducted up to hundreds of EMS and fire service studies.

- The President of the firm, with more than 40 years of fire service analytical experience would manage the project.
- Our lead analyst, Robert Finn, has led the analysis of numerous fire department staffing studies across the Country. He has been with the firm for over 10 years.
- We are a 'fact based' firm providing detailed data collection and analysis.
- We obtain extensive input from 'stakeholders' in all our studies, including municipal managers and elected officials, EMS and fire service managers.
- We work closely with our clients through interim reports and review meetings.

If you have any questions, please do not hesitate to contact me at 650-858-0507 or via email at [rbrady@matrixcg.net](mailto:rbrady@matrixcg.net). I can also be contacted at the letterhead address.



Richard Brady, President  
**Matrix Consulting Group**



## A Firm and Project Team

This section of the proposal includes an introduction to the Matrix Consulting Group and provides a summary of our experience.

### 1 Introduction to the Firm

Founded in 2003, the Matrix Consulting Group was formed by senior government consultants who created it to pursue a service in which experienced people perform the work necessary to solve client problems and assisting them to prepare for the future. Our only business focus is the provision of organization and management analytical services to local government.

While we provide a variety of services to local government our most significant service area is public safety. The Matrix Consulting Group project team has conducted studies of more than 400 fire and EMS service agencies in California and throughout the United States since being founded.

Our firm is incorporated in California and maintains offices in San Mateo and Irvine. As a national firm, we also have offices in Dallas (TX), Portland (OR), Edwardsville (IL), Fort Myers (FL), and Charlotte (NC). We currently have 25 full-time staff and 5 part-time staff.

### 2 Summary of Our Fire Service Consulting Experience

Our services in fire and EMS consulting are varied and include:

- Fire service staffing and deployment studies
- Master planning and strategic planning
- Standard of cover studies
- Feasibility assessments
- Implementation planning

Our fire and EMS service consulting experiences the past few years includes the following agencies, with California agencies in **bold**. Within our experience is a recent study we conducted of the **Richmond** Fire (and Police) Department.

<b>Albany, California</b>	Grants Pass, Oregon	<b>Pacific Grove, California</b>
<b>Atherton, California</b>	<b>Huntington Beach, California</b>	<b>Palm Desert, California</b>
Barnstable, Massachusetts	<b>La Quinta, California</b>	<b>Placer County, California</b>
Bellingham, Washington	<b>Los Banos, California</b>	<b>Red Bluff, California</b>
<b>Big Bear, California</b>	<b>Mercer County, California</b>	Reno, Nevada
<b>Butte County, California</b>	Milwaukee, Wisconsin	<b>Sebastopol, California</b>
Chelsea, Massachusetts	<b>Monrovia, California</b>	<b>Vacaville, California</b>
<b>Dinuba, California</b>	<b>Monterey, California</b>	<b>Vernon, California</b>
<b>Dixon, California</b>	<b>Napa, California</b>	<b>West Sacramento, California</b>

We are also conducting fire studies in **Morro Bay** and **Napa County (CA)**.

### 3 Project Team

We are providing Richmond with a senior team of consultants including the leadership of the firm and its public safety practice. The project team is the same one that conducted Richmond’s Emergency Services Study in 2023 and has strong background knowledge of the emergency response system and issues facing the City in the transition to becoming an ALS/Paramedic first responder agency. The following is a summary of experience for the proposed project team.

- **Richard Brady**, President of the Matrix Consulting Group, has provided public safety consulting services to agencies for over 40 years. He was the project manager on the previous Richmond study.
- **Robert Finn**, a Senior Manager with over 10 years of consulting experience, who previously served as the Chief of the Southlake (TX) Department of Public Safety. He has experience with the Center for Public Safety Excellence (CPSE) serving as a peer assessor, team leader and technical expert. He served as the lead analyst on the 2023 Emergency Services study.
- **Terry Lewis**, a Manager, who has been a fire consultant for over 8 years. He also has previous experience at all levels of the fire service, including as Chief of the Henderson, KY Fire Department. He has experience with the CPSE serving as a peer assessor, team leader and agency mentor. He served as a project analyst on the 2023 Emergency Services study.
- **Ryan Peterson** is a Consultant with the firm that specializes in GIS and data analysis and the deployment options for properly locating fire stations. He served as a data analyst on the 2023 Emergency Services study.

## B Workplan and Timeline

The following section contains information about our firm's approach to providing services like those requested by the City of Richmond, and a task plan outlining of the steps the project team will take to conduct and complete this staffing study. Following the task plan is a suggested schedule for completion of the study.

### 1 General Approach

Our place in the government consulting industry is based on our experience and our approach to project management and analysis. Our detailed approach to providing strategic planning consulting services is client centered, recognizing that each client environment is unique. Our methodology includes:

- Extensive interviews with staff and external stakeholders.
- Detailed understanding of the fire, rescue, and EMS operations through review of previous strategic plans, standards of cover documents, annual reports, etc.
- Collaboration with the client as the study proceeds, including obtaining buy-in from staff and stakeholders for our recommendations.
- Detailed reports that provide a discussion of our analysis, the recommendations developed, and an implementation plan to guide our client in making necessary changes over the planning horizon.

We are known for the depth and insight of our analysis and our client responsiveness. We believe very strongly in the science of our craft. As a result, we approach each project utilizing the following techniques as a baseline:

- **Project Management:** One critical success in conducting a strategic planning project in an efficient, timely, and effective approach to project management. The Matrix Consulting Group utilizes project management approaches that assures we have minimum impact on staff and their daily operations while providing effective coordination of the project.
- **Information Gathering:** Equally important to the success of the project are the methods we use to collect, analyze, and present information to formulate findings and develop and assure acceptance of recommendations. The Matrix Consulting Group has developed and fine-tuned over the years several information-gathering tools and techniques that enable us to gather information efficiently and quickly.

- **Interaction:** Continual communication between the client and project team is a critical component of this study. We will conduct numerous interviews with management as well as supervisory and line Fire Department staff and others in the City, as needed. Additionally, we will have ongoing communication with the Fire Department related to project status and review of project deliverables.
- **Quality Control:** Our project manager designs and personally reviews all interim and final products before they are delivered to the client. This is to ensure a quality document and that all services and analytical efforts outlined in our proposal have been fully completed.
- **Implementation:** Our projects result in implementable recommendations and solutions for our clients. We develop an implementation action plan that identifies the resources required for the implementation, degree of difficulty, and a time frame for successful implementation. The implementation action plan is critical, especially for recommendations that include significant capital and reoccurring costs.

Our approach to each project results in approximately 85% of recommendations being implemented.

## Work Plan

### **Task 1 | Initiate the Project and Document Fire and Emergency Medical Service Trends and Issues That Led to this Study.**

To develop the ALS/Paramedic feasibility study in partnership with the City of Richmond, the project team will first develop an initial understanding of the Department and its service environment, as well as seek input on existing service levels and potential issues from the City Manager, Department leadership and other key stakeholders identified. This will allow the project team to understand any staffing, deployment or operational changes that have occurred since the 2023 study.

This process includes the following elements:

- Interviews with the City Manager and elected officials, if desired, to obtain views on fire and EMS service issues and any critical issues surrounding the feasibility of an ALS/Paramedic first responder system. Other external stakeholders identified by the City and Department would also be interviewed.
- Interviews with the Interim Fire Chief and command staff in order to obtain their views on service issues and improvement opportunities in the department as well

as any critical service issues requiring discussion and understanding prior to the development of the implementation planning process.

- Interview County EMS officials to understand the elements required to transition from a BLS to ALS first responder.

These initial interviews will focus on determining individual attitudes toward current fire and EMS services in Richmond and organizational considerations, including:

- Adequacy of existing service levels, including responsiveness to the community.
- Ability to effectively recruit and retain staff.
- Issues relating to deployment and service consistency in the City.
- Other issues with respect to emergency medical and/or special operations.

The project team will also collect various documents, including departmental goals and objectives statements, as well as other organizational materials, the current strategic plan and budget documents.

#### TASK RESULT

Based on the results of these interviews and initial data collection, the project team will prepare a detailed project schedule and workplan to organize the project team responsibilities and timelines.

### **Task 2** | **Review and Evaluate Relevant Data and Statistics.**

The purpose of this task is to update our knowledge and understanding of the Fire and EMS systems and obtain the necessary data, knowledge and background to provide a framework for the current system demands and needs for the feasibility study.

Tasks associated with this objective would include a review of any and all current or historical documents, reports, and data necessary to understand the current clinical, operational and financial aspects of the Fire and EMS delivery system. At a minimum, this review will include:

- The geographical territory that comprises the current Fire and EMS service area.
- CAD data from 2022 and 2023 to allow a full understanding of call volume and duration of calls in Richmond and update of the information from the 2023 study.
- The current deployment and staffing of units provided by Richmond Fire, private

EMS and mutual aid partners.

- The current organizational makeup of the Richmond Fire Department including, facilities, apparatus, training of personnel and equipment along with the ability of the organization to effectively assume the responsibility of providing ALS EMS first responder services in the City.
- Current and trended budget data over the past three fiscal years to understand the current funding associated with providing services to the City.
- Relevant statutes, ordinances, regulations and contracts
- Current State and County regulations regarding providing ALS EMS first responder services and requirements needed for Richmond to fully comply with State Health regulations and County service requirements and any licensing requirements.
- Current initial and ongoing training requirements for both Basic Life Support and Advanced Life Support training levels in California and any special County required training requirements.
- The costs and revenues related to providing EMS first responder services.

#### TASK RESULT

This task will result in an update of the current situation in Richmond and examine the performance of the Fire/EMS system since the 2023 Emergency Services study.

### **Task 3 | Analyze Options for Providing ALS/Paramedic First Responder Services**

By this point, the project team will be in position to fully examine the options available for Richmond to provide ALS/Paramedic First Responder Services, the project team will:

- Evaluate the current workload and unit utilization for providing EMS services currently in Richmond.
- Determine the number of first responder units and staffing required to meet the system demand.
- Fully analyze and evaluate the option integrating ALS/Paramedic first response as part of the existing Richmond Fire Department.

- Fully analyze any other system design that arises from background research and comparative analysis of surrounding communities in providing ALS/Paramedic first responder services.

#### TASK RESULT

The result of this task would be a full documentation of each of the options available for providing ALS/Paramedic first responder services in Richmond.

### Task 4 | Develop Implementation Timelines

Once the work tasks noted above have been completed, the project team will develop implementation timelines for each of the service options. These will be in accordance with the State of California and Contra Costa County ALS license requirements. This will include the following elements:

- Development of specifications and equipment requirements for the ALS first responder apparatus to be Certified, licensed, and Classified as an ALS unit.
- Development of equipment, medication and supplies required on ALS units.
- Recruiting, hiring, and training requirements for each service option.
- Development and implementation of ALS protocols for patient care.

#### TASK RESULT

The result of this task would be a finalization of the mission, vision and values statements along with development of the final goals, objectives, key accountability and timing for the strategic goals to be included in the plan.

### Task 5 | Develop Financial Estimates

In this task the project team will develop financial projections for each of the options and implementation strategies recommended for each of the service delivery options. This will include:

- Estimate potential revenue to be realized in each option.
- Estimated salary, benefit, and overtime costs of each option.
- Estimated cost for any required equipment, supplies, and medication.

- Estimated costs for any training required, both initial and continuing education.

**TASK RESULT**

The result of this task would be a full financial forecast for each ALS/Paramedic first responder service delivery option.

**Task 6 | Develop the Draft and Final Reports**

This task will focus on finalizing the elements needed to fully develop the ALS/Paramedic First Responder Plan, focusing on the organizational capabilities, challenges and goals and objectives for maintaining or improving the services delivered to the community. The Project Report and Implementation Plan will address each of the areas analyzed and discussed earlier in the project as well as examination of the following:

- Updating the current workload, performance, and system demand for EMS services.
- Comparative analysis to understand how similar communities are providing required ALS first responder services.
- Full analysis of options available to the City for providing ALS/Paramedic First Responder services.
- Implementation plan to show timelines and responsibility for implementing each of the possible options for providing ALS First Responder services.
- Fully detailed cost of any proposed costs or savings from the changes.

**TASK RESULT**

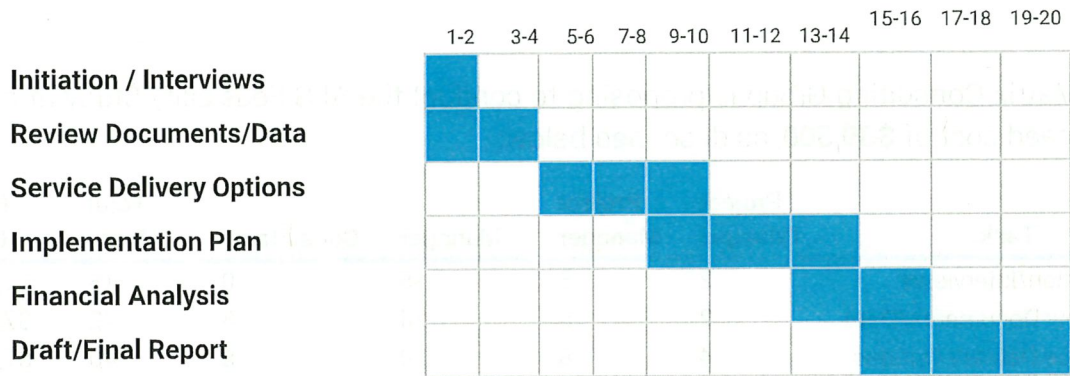
The results of this task would be draft and final reports, which would be submitted to the City for internal review and comment prior to making them final. Once finalized we would be prepared to make a presentation of the results of the study at a public meeting if desired.

**Project Schedule**

The table below displays the tentative schedule. The chart shows the sequencing of each proposed work task, the elapsed time it would take to complete each task. As can be seen from the chart, we are proposing that the study be completed in 20 weeks (approximately 5 months).



**Project Schedule of Project Tasks by Week**



## C Project Cost

The Matrix Consulting Group is proposing to conduct the ALS Feasibility Study at a not-to-exceed cost of **\$39,500**, as described below:

Task	Project Principal	Project Manager	Manager	Consultants	Total Hours	Total Cost
Initiation/Interviews	2	8	8	0	18	\$3,600
Review Documents/Data	2	8	24	8	42	\$7,000
Service Delivery Options	4	8	20	8	40	\$7,000
Implementation Plan	4	8	16	0	28	\$5,400
Financial Analysis	2	8	16	4	30	\$5,300
Draft/Final Report	4	16	24	8	52	\$9,400
<b>Total Hours</b>	<b>18</b>	<b>56</b>	<b>108</b>	<b>28</b>	<b>210</b>	
Rate Per Hour	\$300	\$200	\$150	\$125		
<b>Professional Fees</b>	<b>\$5,400</b>	<b>\$11,200</b>	<b>\$16,200</b>	<b>\$3,500</b>		<b>\$36,300</b>
Project Expenses						\$3,200
<b>TOTAL COST</b>						<b>\$39,500</b>

Our usual practice is to invoice our clients monthly for time and materials up to the total project amount. We are also amenable to alternative invoicing arrangements.