



**REQUEST FOR PROPOSAL  
CONSULTING SERVICES FOR  
COMMUNITY ENGAGEMENT AND  
FINANCIAL STRATEGY ON POLLUTERS PAY  
SETTLEMENT FUND**

Please read this complete document and all information listed below regarding this Request for Proposal (RFP) on the BidsOnline webpage prior to submitting your proposal.

**Release Date:**

February 11, 2026

**Deadline for Submittal**

Proposals will be received until: 2:00P.M. on March 11, 2026

**Contact Information:**

Avinesh Nadan

Finance Department

**Proposal Access and Submission Instructions**

Proposals must be submitted electronically via the City of Richmond's secure online bidding system. No paper or emailed submissions will be accepted.

Interested parties may download the full RFP by visiting the City's Bids Online portal at [www.ci.richmond.ca.us/bids](http://www.ci.richmond.ca.us/bids). New vendors will be required to complete a one-time registration in order to access and download the solicitation documents. Once registered and the RFP is downloaded, the vendor's name will appear on the Prospective Bidders List, and they will receive all subsequent addenda and notifications related to this solicitation.

## **INTRODUCTION**

On January 27, 2026, Richmond City Council directed the city manager to engage a consultant to collaborate with City staff, City Council, and community stakeholders to conduct community engagement and get input on a strategy for holding and releasing the funds and get input on a framework for the expenditure of new General Fund revenues generated by the Polluters Pay Settlement.

The City of Richmond' Finance Department is issuing this Request for Proposals (RFP) to engage a qualified consultant and/or consultant team to assist in developing a comprehensive financial strategy and community engagement process for the allocation of funds.

On August 14, 2024, the City Council adopted Resolution No. 98-24, withdrawing the Polluters Pay Ballot Measure in exchange for an agreement by Chevron Corporation to pay the City \$550 million over a 10-year period. Subsequently, on September 24, 2024, City Council adopted Resolution No. 105-24 which established guiding principles for the stewardship of the funds and declared the City's intention to allocate these Settlement Funds toward projects that improve residents' quality of life while reducing economic dependence on fossil fuels.

### **Expenditure Goals:**

- To create a Just Transition away from a fossil fuel economy, towards a healthy, inclusive and thriving economy for Richmond;
- To decrease the City's dependence on Chevron, generating new tax revenue streams for the City and high-quality union jobs for Richmond residents;
- To repair the harm posed by Chevron's operations on residents' health and neighborhoods, particularly frontline communities and those affected most historically;
- To ensure transparency and public accountability on how the funds are spent, including public involvement in allocating funds for community-visioned ideas;
- To protect workers, especially those in impacted industries, and those who work for the City during the ongoing and accelerating economic transition.

In order to meet those goals, the City Council proposed a preliminary expenditure framework organized around the following investment categories:

- Large-scale Economic Development: Investment in large-scale projects that would generate tax revenue and have the potential to create high quality union jobs with good benefits while strengthening and diversifying Richmond's economy.
- Inclusive Economic Development: Projects that support small to mid-sized businesses and build the skills of Richmond's local workforce. This shall include but not be limited to small business grants and job training.

- Community Visioned Projects – Projects and programs directly proposed and developed by Richmond residents that provide direct benefits to Richmond residents and support a Just Transition. A community board would be established to develop criteria, solicit and prioritize projects, and ensure accountability and transparency in the execution of projects.
- Investments in Essential Services & Public Works: Critical infrastructure projects that improve the health and quality of life of Richmond’s residents, along with emergency and climate resilience. This includes but is not limited to, a ‘Complete Streets’ approach to pedestrian safety, bike lanes, public transportation infrastructure, flood mitigation, improvements to public parks, and make available renewable energy and efficiency upgrades.
- City Staffing and Consultants: Increase staffing in necessary departments to execute the goals of the fund in order to strengthen, diversify and transition the City economy from fossil fuels and deliver high impact projects that improve residents’ lives. As needed, seek the expertise of consultants to offer temporary and specific expertise on economic diversification, workforce development, and climate resilience.

Community governance and accountability:

- In accordance with the Intent Resolution 105-24 which stated that the City Council should evaluate means for expenditures from the funds or funds to be “governed in a manner that is fully transparent and democratic, implementing community-led decision making to the maximum extent allowable under the City Charter”, an important feature of the framework is ensuring community governance and accountability. Community oversight through an advisory board will support equity, transparency, and community alignment.

In addition to these preliminary investment categories, transparency, public accountability, and community governance are essential elements that must guide the use of Polluters Pay Settlement funds across all categories. This includes public involvement in shaping priorities, allocating funds particularly for community visioned projects and monitoring outcomes to ensure funds are used in alignment with Council intent and community expectations.

Authentic and meaningful community input is essential, as the feedback gathered through this process would inform refinement of the expenditure framework, identify specific project ideas within each category if it is possible, and establish ongoing accountability mechanisms prior to Council consideration and adoption.

The consultant will collaborate with City staff, City Council, and community stakeholders to:

- Conduct robust community engagement sessions to gather input on strategies for holding and releasing funds.
- Develop a transparent and equitable framework for expenditure of new General Fund revenues generated by the settlement.

- Provide expert financial advice on investment options to maximize earnings while the community process is underway.

## **ABOUT THE CITY**

The City of Richmond is a Charter City located in Contra Costa County, part of the San Francisco Bay Area, with a population of approximately 115,353 residents. Richmond is one of the region’s most diverse communities with 45.5 percent of residents identify as Hispanic or Latino, 16.4 percent identify as Black or African American alone, 21.2 percent identify as White alone (not Hispanic or Latino), and 13.8 percent identify as Asian alone.<sup>1</sup>

Richmond boasts a multi-modal transit hub that includes BART, Amtrak, and AC Transit, along with marinas, shopping centers, recreational and cultural amenities, and 32 miles of shoreline, making it one of California’s most desirable up-and-coming communities.

Richmond operates under a council-administrator form of government, with a Mayor and six council districts represented by elected Councilmembers. The City employs approximately 850 full-time equivalent and part-time employees. The City of Richmond provides a full range of municipal services including police and fire protection; construction and maintenance of highways, streets and infrastructure; library services; storm water and municipal sewer systems; operation of a wastewater treatment facility; and the administration of recreational activities and cultural events. Additionally, the City operates the Richmond Memorial Convention Center and the Port of Richmond, supporting economic development and regional connectivity.

### **Community Profile**<sup>1</sup>

- Median Household Income: ~\$95,000
- Foreign-born Residents: ~34.5%
- Languages: Approximately 54% of residents speak a language other than English at home
- Housing: Median home value ~\$668,000; owner-occupied housing ~55%
- Transportation: Average commute time ~34 minutes; strong public transit access

The City has shown leadership in addressing equity and sustainability by adopting a [Health in All Policies](#) (HiAP) Ordinance and Strategy, [Climate Action Plan](#) (CAP), and [Economic Development Action Plan](#) (EDAP), as well as focused work surrounding [Race, Equity and Inclusion](#). Richmond’s diversity, economic potential, and strategic location position it as a leader in equitable development and community-driven planning.

---

<sup>1</sup> Quick facts Richmond city, California. U.S. Census Bureau. Based on 2024 estimates.  
<https://www.census.gov/quickfacts/richmondcitycalifornia>

## **SCOPE OF WORK**

The City of Richmond seeks a qualified Consultant(s) to collaborate with City staff, City Council, and community stakeholders in developing a transparent and equitable financial strategy for managing and allocating funds from the Polluters Pay Settlement. The consultant will lead community engagement efforts and provide expert financial guidance to ensure funds are held and invested responsibly while a framework for expenditure is developed.

### **Key Objectives**

#### **1. Community Engagement**

Community engagement is essential to this project, and the community engagement facilitators should have the qualifications and competency to successfully engage diverse populations throughout the process. The consultant should use the information and learnings collected from the community to directly inform reports and recommendations. Community engagement should be accessible to all community members and include a variety of voices and stakeholders including community groups, labor unions, and individuals particularly in neighborhoods impacted by environmental pollution caused by the local refinery's pollution-frontline communities, Black and Brown, and low-income communities. The consultant should incorporate various methods of both information gathering and communicating results back out to the community and stakeholders.

- Conduct at least 6 input in-person sessions in accessible locations across all districts, ensuring interpretation services are provided and all materials are translated. Childcare and food should also be provided. The consultant should determine its ability to provide these services; City may be able to support some elements of the engagement events in a limited capacity.
- Develop an online platform for residents to submit feedback and ideas.
- Develop materials summarizing each community engagement session for sharing on the City's website
- Conduct interviews with each City Council member to collect input.

#### **2. Financial Strategy Development**

- Advise on investment options for holding settlement funds in an account that maximizes earnings during the engagement process and beyond.
- Provide recommendations for long-term financial management and allocation strategies aligned with community priorities.

#### **3. Framework for Expenditure**

- Gather and synthesize community input on preliminary expenditure categories, as well as other options:
  - Large-Scale Economic Development
  - Inclusive Economic Development

- Community Visioned Projects
- Investments in Public Works & Infrastructure
- City Staffing & Consultants
- Ensuring community governance and accountability.

#### **4. Reporting and Deliverables**

- Community engagement plan and outreach materials.
- Financial strategy report for holding and releasing funds.
- Develop a proposed framework for adoption by City Council that reflects community priorities and legal requirements.
- Summary community feedback and identify common themes, priorities, and project ideas
- Draft expenditure framework based on community input.
- Final report and presentation to City Council.

### **COLLABORATION AND ENGAGEMENT REQUIREMENTS**

The selected consultant shall collaborate independently and distinctly with City staff, City Council, and community stakeholders throughout the duration of the engagement. Engagement with one group shall not replace, substitute for, or be deemed sufficient engagement with any other group.

Each group shall receive engagement that is tailored to its role, authority, and function within the process.

#### **A. City Staff Collaboration**

The consultant shall coordinate closely with designated City staff to support project implementation and alignment with City processes. At a minimum, collaboration with City staff shall include:

- Regular coordination meetings with designated City Manager’s Office staff and other identified departments
- Review of project scope, timelines, and engagement materials prior to public release
- Ongoing communication to ensure consistency with City policies, legal constraints, and Council direction
- Identification of operational considerations and implementation constraints for informational purposes only

#### **B. City Council Engagement**

The consultant shall engage directly with City Council in a manner appropriate to the Council’s governance and oversight role. City Council engagement shall include, at a minimum:

- One or more workshops, briefings, or study sessions, as directed by the City
- Opportunities for City Council to provide input on engagement priorities, guiding principles, and policy considerations

- Clear distinction between informational updates and advisory recommendations

### C. Community Stakeholder Engagement

The consultant shall design and implement an inclusive community engagement process to gather input from community stakeholders. Community engagement shall include:

- Multiple engagement methods (e.g., public meetings, focus groups, surveys, listening sessions)
- Outreach strategies designed to reach impacted and underrepresented communities
- Neutral facilitation focused on gathering input rather than advocating for specific outcomes
- Clear communication that community input will inform, but not determine, City Council decisions

### D. Non-Substitution Requirement

The consultant shall ensure that:

- Engagement with City staff, City Council, and community stakeholders occurs separately and independently
- Input from one group is not presented as representative of another group
- No single engagement activity satisfies multiple engagement requirements unless expressly approved in writing by the City

Failure to meet engagement requirements for any one group shall be considered a failure to meet the scope of work.

### E. Documentation and Reporting of Input

The consultant shall document and report input from each group separately and transparently. At a minimum, documentation shall include:

- A description of engagement methods used for each group
- A summary of key themes, questions, and considerations raised by each group
- Identification of areas of alignment and divergence among groups, without reconciliation or prioritization by the consultant

All documentation shall clearly indicate that input is advisory in nature and that final decisions rest exclusively with City Council.

## **DELIVERABLES AND MILESTONES**

### A. Workplan and Engagement Schedule

The selected consultant shall develop and submit a detailed work plan within 30 days of contract

execution. The workplan must include, at a minimum:

- A comprehensive project schedule identifying all major tasks, milestones, and deliverables
- A community engagement plan outlining proposed engagement methods, target stakeholders, and timelines
- Coordination points with City staff and anticipated City Council touchpoints
- Key decision and review milestones aligned with City Council meeting schedules
- A timeline that ensures completion of all required deliverables no later than **month day, 2026**

The workplan is subject to City review and approval prior to implementation.

#### B. Interim Check-Ins with City Staff

The consultant shall conduct regular interim check-ins with designated City staff throughout the term of the engagement. At a minimum, this shall include:

- Monthly or milestone-based status meetings with City staff
- Written progress updates summarizing completed activities, upcoming tasks, and any issues requiring City input
- Ongoing coordination to ensure alignment with City processes, schedules, and governance requirements

These check-ins are intended to support coordination and transparency and do not confer decision-making authority to the consultant.

#### C. City Council Updates

The consultant shall provide at least one formal update to City Council as per submitted workplan. This update may be in the form of a study session, workshop, or informational presentation, as determined by the City.

The City Council update shall include:

- A summary of engagement activities completed to date
- Key themes and input received from City staff, City Council, and community stakeholders
- Preliminary observations and considerations to inform future Council deliberations

All City Council updates are informational in nature. No recommendations presented at interim updates shall be binding or implemented without subsequent City Council action.

#### D. Final Report and Presentation

As per the detailed workplan, the consultant shall prepare and present a final report to City Council. The final report and presentation shall include, at a minimum:

1. Recommended Framework for Expenditure of Polluters Pay Settlement Funds
  - a. A high-level, principles-based framework intended to inform City Council deliberations
  - b. Identification of potential funding categories, guiding principles, and policy considerations
  - c. Clear acknowledgment that the framework is advisory only and subject to City Council approval, modification, or rejection
  
2. Recommended Strategy for Holding and Releasing Funds (Advisory Only)
  - a. Advisory considerations regarding the timing and conditions under which funds may be held or released
  - b. Alignment with the City Council’s direction that funds will be held in an investment account during the engagement process
  - c. No authority to manage, direct, or execute investment or fund-release decisions
  
3. Summary of Engagement and Input
  - a. Documentation of engagement activities with City staff, City Council, and community stakeholders
  - b. A summary of key input received from each group, presented in a transparent and neutral manner

**TIMELINE SCHEDULE**

Schedule of Events	Date
Request for Proposals (RFP) release	February 11, 2026
Questions	February 20, 2026 by 2:00pm PST
Response in Q&A tab & Notification	February 24, 2026
RFP Due date	March 11, 2026 by 2:00 pm PST
RFP Evaluation	March 12-17, 2026
Update to City Council	March 24, 2026
Interviews/Selection	March 18-31, 2026
Contract Award by City Council	April 21, 2026 (tentative)

**PROPOSAL FORMAT GUIDELINES**

The proposal should be concise, well organized, and demonstrate the proposer’s qualifications and experience applicable to the Project.

Each proposal will adhere to the following order and content of sections. Proposal should be straightforward, concise and provide “layman” explanations of technical terms that are used.

Emphasis should be concentrated on conforming to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description of the offer. The following proposal sections are to be included in the Vendor's response:

### **1. Vendor Cover Letter**

(Recommended Page Limit: 3 pages)

A cover letter, not to exceed three pages in length, should summarize key elements of the proposal and shall:

- Confirm that all elements of this RFP have been reviewed and understood.
- Include a statement of intent to perform the services as outlined.
- Express company's willingness to enter into an agreement under the terms and conditions prescribed by this RFP, insurance requirements (Attachment A) and in the sample Service Agreement (Attachment B);
- Submit a written description and brief history of the company's experiences, qualifications and successes in providing community engagement and financial strategy services described herein. Please indicate the number of employees, client base and location of offices.
- Indicate the address and telephone number of the vendor's office located nearest to Richmond, California and the office from which the project will be managed.
- Confirm that vendor has a minimum of three (3) years verifiable community engagement assessment experience
- Proposers must disclose whether they, or any of their principals, officers, employees, agents, or subcontractors, have had any communication with members of the City Council regarding this solicitation, the subject matter of this solicitation, or related City business within the six (6) months preceding the release date of this RFP.

If any such communication has occurred, the proposer must provide the following information:

- Name of the City Council member(s)
- Date(s) of communication
- Method of communication (e.g., meeting, email, phone)
- General subject matter discussed

Disclosure of such communications will not, by itself, disqualify a proposer or affect the evaluation of proposals. However, failure to disclose required information may result in a proposal being deemed non-responsive or rejected.

- Stipulate that the proposal price will be valid for a period of at least 180 days.
- Identify a single person for contact during the RFP review process; and

- Cover letter shall be signed by an authorized official of the company.

## **2. Firm Qualifications and Relevant Experience**

(Recommended Page Limit: 5 pages)

Proposers shall provide:

- A description of the firm’s experience providing community engagement and advisory services for public agencies
- Specific examples of projects involving restricted, settlement-derived, or otherwise designated public funds
- Identification of public-sector clients and a clear description of the proposer’s role on each project, including whether services were advisory, facilitative, or decision-support, as opposed to decision-making or implementation

## **3. Understanding of the Project and Governance Context**

(Recommended Page Limit: 3 pages)

Proposers shall describe:

- Their understanding of the City Council’s direction related to the Polluters Pay Settlement and the purpose of this engagement
- The consultant’s role as advisory only, with explicit acknowledgment that all final decisions rest with City Council
- Demonstrated understanding of public-sector governance structures, including the distinct roles of City Council, City management, City staff, and the public

## **4. Proposed Approach and Workplan**

(Recommended Page Limit: 5 pages)

Proposers shall submit:

- A narrative describing the proposed approach to collaboration with City staff, City Council, and community stakeholders
- A description of engagement methods, clearly explaining how engagement with each group will occur independently and without substitution
- A high-level workplan and schedule demonstrating the proposer’s ability to meet required milestones, including providing a City Council update and final deliverables by **month day, 2026**

## **5. Community Engagement Strategy**

(Recommended Page Limit: 4 pages)

Proposers shall describe:

- Inclusive engagement methods and outreach strategies designed to reach impacted and diverse communities
- An approach to neutral facilitation, avoiding advocacy, persuasion, or outcome-driven engagement
- Methods for documenting, summarizing, and reporting community input in a clear, transparent, and non-directive manner

## **6. Deliverables and Reporting**

(Recommended Page Limit: 3 pages)

Proposers shall provide:

- A description of proposed deliverables aligned with the RFP, including advisory frameworks, reports, and presentations
- An explanation of how recommendations will be presented as non-binding and advisory, with decision points clearly reserved for City Council
- A sample table of contents or outline for the final written report and City Council presentation

## **7. Team Qualifications**

(Recommended Page Limit: 3 pages)

Proposers shall identify:

- The proposed project manager and key staff assigned to the project
- Relevant experience of team members with public-sector governance, community engagement, and presentations to elected bodies
- The role, responsibilities, and level of involvement of each team member

## **8. Experience Presenting to Elected Bodies**

(Recommended Page Limit: 2 pages)

Proposers shall provide:

- Examples of presentations or briefings delivered to City Councils, Boards, or Commissions
- A description of how the proposer distinguishes between informational updates, advisory recommendations, and decisions reserved to elected officials

## **9. References**

(No Page Limit)

Provide at least three (3) references from public-sector clients for similar work. Include:

- Project name
- Public agency name
- Contact name, title, phone number, and email
- Brief description of services provided

#### **10. Value Added Services**

Please provide any additional services of benefit not specifically required herein, which the Respondent offers to provide.

#### **11. Contractor Assignment of Sub-Contract**

The resulting contract shall not be assigned, transferred, or sublet, in whole or in part, without the prior written approval of the City of Richmond. If Proposers intend to subcontract any portion of the resulting contract, they must describe their process for selecting such subcontractor(s) and the quality control measures that the Proposer will employ to ensure that any subcontractor complies with the provisions of Proposer's contract with the City.

#### **12. Previous Contracts with the City of Richmond**

The proposer shall submit a list which indicates all prime contracts and/or amendments awarded to the proposer by the City of Richmond for the last three (3) years. The list shall include a short description of the Project, the scope of work, award date, completion date, name of City of Richmond's assigned Project Manager, and contract value.

#### **13. Exceptions to this Request for Proposals**

The proposer shall state whether it takes exception(s) to this RFP, including but not limited to the City of Richmond's Standard Services Agreement – RFP (Attachment B). If the proposer does take exception(s) to any portion of the RFP or contract, the specific portion to which exception(s) is taken must be identified by section number and explained. Requests for changes or additions to sections of City of Richmond's Standard Services Agreement must be made by requesting deletion of specific words and/or by providing newly requested contract language. Requests for complete replacement of the City of Richmond's Standard Services Agreement for another contract will not be granted. Failure to make exceptions to the RFP or Standard Services Agreement within the proposal will be deemed a waiver of any objection. Exceptions will be considered during the proposal evaluation process.

#### **14. Statement of Impartiality and Disclosure**

The nature of this Project requires an impartial unbiased approach on the part of the proposer's team. This proposal shall include a statement declaring that the proposer's and sub-consultants are not currently, and will not, during the performance of these services, participate in any other similar work involving a third-party with interests currently in conflict or likely to conflict with City of Richmond's interests. Additionally, proposer is required to disclose any pending or active investigations or litigation that may affect the reputation or ability of the

proposer to carry out the Project.

### **Cost Proposal Submission Requirements**

Proposers shall submit a separate, clearly labeled Cost Proposal as an attachment to the proposal. The Cost Proposal must be sufficiently detailed to allow the City to evaluate pricing, cost realism, and alignment with the advisory and facilitation-only scope of services described in this RFP.

Failure to submit a complete and compliant Cost Proposal may result in the proposal being deemed non-responsive.

#### **1. Cost Summary**

Proposers shall provide:

- A total not-to-exceed contract amount for the full term of the engagement
- A summary table identifying total costs by major task, phase, or deliverable, consistent with the proposer's workplan

#### **2. Detailed Cost Breakdown**

Proposers shall submit a detailed cost breakdown that includes, at a minimum:

- Labor categories and position titles
- Hourly rates for each labor category
- Estimated hours by task and by labor category
- Subtotal costs by task or phase
- Total labor cost

Costs must be clearly traceable to specific tasks and deliverables identified in the RFP.

#### **3. Assumptions and Constraints**

Proposers shall clearly identify:

- All assumptions used to develop the cost proposal
- Confirmation that pricing is based solely on the scope of work described in this RFP
- Identification of any optional or alternative tasks, if permitted, priced separately and clearly labeled as optional

#### **4. Allowable and Non-Allowable Costs**

Proposers shall identify any proposed allowable direct costs, such as travel or meeting-related expenses, if applicable.

Proposers shall explicitly confirm that no costs are included for any of the following non-allowable activities:

- Program or project implementation
- Allocation, release, or management of funds
- Advocacy, lobbying, marketing, or promotional campaigns
- Investment advisory, financial management, or fund management services

Costs associated with non-allowable activities will not be evaluated.

#### 5. Reimbursable Expenses (If Applicable)

If reimbursable expenses are proposed, the Cost Proposal shall include:

- An itemized list of proposed reimbursable expenses
- A separate not-to-exceed amount for reimbursables
- Confirmation that reimbursable expenses will be billed at actual cost with no markup

#### 6. Cost Control and Billing

Proposers shall describe:

- The proposed billing structure (e.g., time-and-materials with a not-to-exceed cap)
- Confirmation that invoices will include sufficient detail to support audit review, including labor categories, hours worked, and tasks performed
- Acknowledgment that payment is contingent upon satisfactory completion of required deliverables and compliance with contract requirements

#### Additional Cost Proposal Instructions

- Costs must be clearly traceable to specific tasks and deliverables
- Lump-sum pricing or blended rates without task-level detail may be deemed non-responsive
- Costs associated with activities outside the advisory scope will not be evaluated
- The Cost Proposal format must allow for side-by-side comparison across proposers

#### Cost Clarification

The City reserves the right to request clarification or negotiate proposed costs to ensure alignment with the advisory-only scope of services.

#### PAYMENT SCHEDULE AND MILESTONES

Payment under the resulting contract shall be tied to satisfactory completion of the milestones below and acceptance by the City. All payments are subject to verification of deliverables and compliance with contract requirements.

Milestone	Deliverable	% of Contract
-----------	-------------	---------------

Milestone 1	City-approved workplan and engagement schedule	15%
Milestone 2	Completion of initial City staff and City Council engagement activities	20%
Milestone 3	Completion of community engagement activities and interim findings memo	25%
Milestone 4	City Council update (workshop/study session)	15%
Milestone 5	Final report and City Council presentation (by month day, 2026)	25%

Additional protections (recommended):

- No payment shall be made for incomplete or unaccepted deliverables
- The City may withhold payment for work performed outside the approved scope
- Invoices must reference the applicable milestone and include sufficient detail for audit review

## **PROCESS FOR SUBMITTING PROPOSALS**

### **A. Questions Concerning the RFP**

All questions must be submitted via the electronic BidsOnline system on the Q&A tab by 2:00pm PST, on February 17, 2026. If the City finds it necessary to issue an addendum, prospective Offerors will receive e-mail notification of addendum. Otherwise, answers to questions received will be provided on the Q&A tab and notification will be sent by February 20, 2026. It is the proposer’s responsibility to periodically check the BidsOnline website [www.ci.richmond.ca.us/bids](http://www.ci.richmond.ca.us/bids) for any possible Addenda to the RFP that may have been posted.

No party submitting a proposal shall contact or lobby any City Council member, City official, employee (except those specified for contact) or agent regarding the RFP. Any party attempting to influence or circumvent the RFP, bid submittal, and review process may have their proposal rejected for violating this provision of the RFP.

Interested parties may download copies of the above-mentioned proposal by visiting the City's web site, [www.ci.richmond.ca.us/bids](http://www.ci.richmond.ca.us/bids). To download RFP, new vendors will be required to register. Once the vendor downloads any documents relative to a solicitation, that vendor's name will appear on the Prospective Bidders list for that project and will receive any addenda or notifications relating to the RFP.

## **B. Submission of Proposals**

The proposal and any required certifications shall be signed by an individual or individuals authorized to execute legal documents on behalf of the proposer.

Electronic Proposals shall be submitted via the City's secure online bidding system. All required sections of the proposal must be submitted via the website. Contractor is solely responsible for "on time" submission of their electronic proposal. The Bid Management System will not accept late proposals, and no exceptions shall be made. Contractors will receive an e-bid confirmation number with a time stamp from the Bid Management System indicating that their bid was submitted successfully. The City will only receive those proposals that were transmitted successfully. The City of Richmond reserves the right to waive inconsequential irregularities.

The proposal must be received no later than 2:00 pm, PST on March 3, 2026.

## **GENERAL GUIDELINES**

This RFP does not commit the City of Richmond to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. The City of Richmond may reject a proposal without providing the reason(s) underlying the decline. A failure to award a contract to the proposer with the lowest cost proposal shall not constitute a valid cause of action against the City of Richmond. The City shall not be responsible for work done, even in good faith, prior to final approval of the proposed contract.

### **The City reserves the right to:**

1. Reject any or all proposals.
2. Issue subsequent Requests for Proposal.
3. Postpone opening for its own convenience.
4. Remedy technical errors in the Request for Proposal process.
5. Negotiate with any, all, or none of the Respondents.
6. Solicit best and final offers from all or some of the Respondents.
7. Select one or more Respondents.
8. Accept other than the lowest proposed fees.
9. Waive informalities and irregularities in proposals.

## **A. Public Records**

All proposals submitted in response to this RFP become the property of the City of Richmond and public records and, as such, may be subject to public review. Documents protected by law from public disclosure will not be disclosed by the City of Richmond if clearly marked with the word "confidential" on each applicable page. Trade secrets may be marked as confidential only to the extent they meet the requirements of California Government Code section 6254.7. Only

information claimed to be a trade secret at the time of submittal to the City of Richmond and marked as "confidential" will be treated as a trade secret.

### **B. Insurance Requirements**

The City of Richmond requires consultants doing business with it to obtain insurance, as shown in RFP Attachment A. The required insurance certificates must comply with all requirements of the standards as shown and must be provided within fifteen (15) days of issuance of the Notice of Intent to Award and prior to the commencement of any work on the Project. See Attachment A Insurance Requirements.

### **C. Business Licenses**

The successful Contractor and all subcontractors used in the work will be required to hold or to obtain a City of Richmond business license for which the fee will not be waived.

### **D. Compliance with City Ordinances**

The contractor and all subcontractors shall comply with the City of Richmond Nondiscrimination Clauses in City Contracts Ordinance ([Richmond Municipal Code \(RMC\) Chapter 2.28](#)), Business Opportunity Ordinance ([RMC Chapter 2.50](#)), Local Employment Program Ordinance ([RMC Chapter 2.56](#)), Living Wage Ordinance ([RMC Chapter 2.60](#)) and Ordinance Banning the Requirement to Provide Information of Prior Criminal Convictions on all Employment Applications (“Ban the Box”) ([RMC Chapter 2.65](#)), which are incorporated into the Contract Documents by this reference.

### **E. Sanctuary City Contracting Ordinance (SCCO)**

The Richmond Sanctuary City Contracting Ordinance No. 12-18 (Attachment D) prohibits the City from granting and or retaining contracts with any person or entity that provides Data Broker or Extreme Vetting services to the U.S. Immigration and Customs Enforcement Division of the United States Department of Homeland Security (“ICE”). Proposers must submit the attached Sanctuary City Compliance Statement with their Proposal. (Attachment C)

### **F. Limited Liability Company Disclosure Statement (LLCS)**

Resolution No. 86-21 (Attachment E), approved by City Council on July 6, 2021, requires disclosure of the identities of beneficial & responsible owners of Limited Liability Corporations (LLC). Proposers must submit the attached Disclosure Statement of Limited Liability Companies Form with their Proposal (Attachment F).

### **G. Collusion**

By submitting a proposal, each respondent represents and warrants that its proposal is genuine and not false or collusive or made in the interest of, or on behalf of any person not named therein; that the respondent has not directly or indirectly induced or solicited any other person to submit a false

proposal, or any other person to refrain from submitting a proposal; and that the respondent has not, in any manner, sought collusion to secure any improper advantage over any other person submitting a proposal.

#### **H. Withdrawal of Proposals**

A respondent may withdraw their proposal before the expiration of the time for submission of proposals by delivering to the Finance Department a written request for withdrawal signed by, or on behalf of, the respondent.

#### **I. Ownership of Documents**

All reports, studies, information, data, statistics, forms, designs, plans, procedures, systems, and any other materials produced for the Project shall be the sole and exclusive property of the City. No such materials or properties produced in whole or in part for the Project shall be subject to private use, copyrights, or patent rights by Respondent in the United States or in any other country without the express written consent of the City. The City shall have unrestricted authority to publish, disclose (except as may be limited by the provisions of the Public Records Act), distribute, and otherwise use, copyright, or patent, in whole or in part, any such reports, studies, data, statistics, forms or other materials or properties produced for this project.

### **PROPOSAL EVALUATION AND SELECTION PROCESS**

All proposals shall be reviewed to verify that the Respondent has met the minimum requirements. Proposals that have not complied with requirements, do not meet minimum content and quality standards, or take unacceptable exceptions to the General Terms and Conditions of the Service Agreement, will be eliminated from further consideration. Proposals will be reviewed and evaluated by an evaluation committee comprised of City of Richmond personnel.

The top Proposals may then be invited to make a presentation to the evaluation panel in a City Office in Richmond, California, at no cost to the City. The selected proposal shall provide the most cost-effective approach that meets the City's requirements. The lowest price proposal will not necessarily be selected.

The City may request Best and Final offers based upon improved understanding of the offers or changed scope of service. The City will negotiate with that vendor to determine final pricing, and contract form. Because this proposal is negotiable, all pricing data will remain confidential until after award is made, and there will be no public opening and reading of Proposals. Overall responsiveness to the RFP is an important factor in the evaluation process. The criteria upon which the evaluation of the proposals will be based include, but are not limited to, the following:

1. Public-Sector Community Engagement Experience on Restricted or Designated Funds

**(Weight: \_\_\_ %)**

- Demonstrated experience conducting community engagement processes for public agencies involving restricted, settlement-derived, or otherwise designated public funds
- Experience navigating legal, fiscal, and policy constraints associated with public monies
- Evidence of work that resulted in advisory frameworks or recommendations rather than direct implementation or allocation of funds

## 2. Facilitation and Advisory Capability (Non-Decision-Making Role)

**(Weight: \_\_\_ %)**

- Demonstrated ability to facilitate discussions, gather input, and synthesize findings without making policy, financial, or programmatic decisions
- Clear understanding of the consultant's role as advisory and non-binding
- Approach emphasizes neutrality, transparency, and documentation rather than advocacy or outcome-driven engagement

## 3. Understanding of Public Governance and Decision Authority

**(Weight: \_\_\_ %)**

- Demonstrated understanding of the distinct roles and authorities of City Council, City management, City staff, and the public
- Experience working within governance structures where final authority is reserved to elected officials
- Proposal reflects appropriate respect for Council authority and avoids assumptions of delegated decision-making

## 4. Experience Presenting to Elected Bodies

**(Weight: \_\_\_ %)**

- Experience preparing and presenting findings, reports, or recommendations to City Councils, Boards, or Commissions
- Ability to clearly distinguish between informational updates, advisory recommendations, and decisions reserved to elected officials
- Quality and clarity of proposed deliverables intended for public meetings

## 5. Approach and Methodology

**(Weight: \_\_\_ %)**

- Proposed approach demonstrates a clear, structured process aligned with the City’s direction and timeline
- Engagement methods are appropriate for public-sector decision-making and inclusive participation
- Emphasis on process integrity, documentation, and accountability

## 6. De-Emphasized Factors

The following will be given limited or no weight in the evaluation:

- Marketing, branding, or promotional campaigns
- Advocacy-oriented messaging or outcome-driven public relations strategies
- Visual design, logos, or rebranding concepts unrelated to governance or engagement objectives

## 7. Cost Proposal

**(Weight: \_\_\_%)**

- Reasonableness: Pricing should be fair and consistent with market standards.
- Realism: Costs must reflect a feasible approach to completing the scope of work.
- Completeness: All required cost elements (labor, materials, overhead, etc.) are included and clearly detailed.
- Transparency: Assumptions and calculation methods are explained.
- Value for Money: Balance between cost and quality of the proposed solution.
- Compliance: Pricing format and structure meet RFP requirements.

## 8. Overall Best Value

The City will consider the proposer’s overall ability to deliver neutral, well-documented, and advisory engagement services that support informed City Council decision-making while respecting governance boundaries.

## **Evaluation, Interviews, and Final Selection**

The City of Richmond will evaluate written proposals in accordance with the evaluation criteria set forth in this RFP. Following completion of the written proposal evaluation, the City will identify the top-ranked proposers and invite them to participate in oral interviews and/or presentations.

After completion of interviews, the City will re-evaluate and re-rank proposers based on interview performance, demonstrated understanding of the scope of work, qualifications, and overall ability to meet the City's needs. Interview results may confirm or change the initial rankings based on written proposals.

The proposer ranked highest after completion of the interview process will be recommended for award, subject to successful contract negotiations, verification of proposer responsibility, and approval by the City as required. Participation in interviews does not guarantee selection or award of a contract.

The City reserves the right to reject any or all proposals, to waive informalities, and to take any action deemed to be in the best interest of the City.

### **Pre-Award Negotiations**

After the proposals are opened, but prior to award, the City may elect to conduct negotiations with the highest ranked respondent for purposes of:

- Resolving minor differences and information
- Clarifying necessary details and responsibilities
- Emphasizing important issues and points
- Receiving assurances from respondents
- Cost/budget clarifications

If the City cannot successfully negotiate a contract with the highest ranked respondent, the City may begin negotiations with the second highest ranked respondent.

Selection may be made without further discussion, negotiations, or Offeror's presentations; therefore, Offeror shall offer the most favorable terms in response to this RFP. The offeror must demonstrate an understanding of the scope of service to be provided and the ability to accomplish the tasks set forth. Offeror shall include information that will enable the City to determine the Offeror's overall qualifications. The City reserves the right to request additional information or clarification on any matter included in the proposal response, to enable the City to arrive at the final award decision.

### **Award**

When the Review Panel has completed its work, City staff will then recommend a Consultant to the City Manager and City Council for approval. The services provided by the successful bidder shall be governed by a Standard Services Agreement (Attachment B).

**Attachments**

- A. Insurance Requirements
- B. Standard Contract
- C. Sanctuary City Compliance Statement
- D. Sanctuary City Contracting Ordinance No. 12-18
- E. Limited Liability Corporation (LLC) Resolution No. 86-21
- F. Limited Liability Corporation Form



**ADDENDUM NO. 1**

**February 13, 2026**

**Consulting Services for Community Engagement and Financial Strategy on  
Polluters Pay Settlement Funds**

This addendum below provides additional information for the weighting criteria for the “Proposal Evaluation and Selection Process” section in the original Request for Proposal which did not state the percentage criteria.

**Proposal Evaluation and Selection Process**

<b>Category</b>	<b>Weight</b>
1. Public-Sector Community Engagement Experience on Restricted or Designated Funds	20%
2. Facilitation and Advisory Capability	15%
3. Understanding of Public Governance & Decision Authority	15%
4. Experience Presenting to Elected Bodies	10%
5. Approach & Methodology	20%
6. De-Emphasized Factors	0%
7. Cost Proposal	15%
8. Overall Best Value	5%
<b>TOTAL</b>	<b>100%</b>

If you have any questions, please contact me at (510) 620-6732.

AVINESH NADAN  
FINANCE MANAGER II  
CITY OF RICHMOND

DATE: 02/13/26

**ADDENDUM NO. 2****February 23, 2026****Consulting Services for Community Engagement and Financial Strategy on  
Polluters Pay Settlement Funds**

This addendum below provides correction to the dates under "Process for Submitting Proposals" Title on page 16 and 17 of the Request for Proposal (RFP).

**A. Questions Concerning the RFP (page 16)**

All questions must be submitted via the electronic BidsOnline system on the Q&A tab by 2:00pm PST, on February 20, 2026. If the City finds it necessary to issue an addendum, prospective Offerors will receive e-mail notification of addendum. Otherwise, answers to questions received will be provided on the Q&A tab and notification will be sent by February 24, 2026.

**B. Submission of Proposals (page 17)**

The proposal must be received no later than 2:00 pm, PST on March 11, 2026.

Note that the above dates were correctly outlined in the **Timeline Schedule** on page 9 of the RFP. All questions were accepted until February 20, 2026.

**Revision to Section 4 – Allowable and Non-Allowable Costs  
(Page 15 of the RFP)**

Section 4, "Allowable and Non-Allowable Costs," is hereby revised as follows:  
The fourth bullet under Non-Allowable Costs is amended to remove the reference to "Investment advisory" services.

The revised bullet shall read:

- Financial management or fund management services.

---

AVINESH NADAN  
FINANCE MANAGER II  
CITY OF RICHMOND

DATE: 02/23/26



City of Richmond

# REQUEST FOR PROPOSAL CONSULTING SERVICE...

*Q&A Deadline February 20, 2026 2:00 PM (PST)*

**Set 1 Released via Email 02/23/2026 4:43 PM (PST) – 20 questions**

**1.1** The RFP calls for a recommended framework for expenditures and holding and releasing funds (Advisory Only). Can the City confirm that since the consultant under 2c. on page 9, it states that "No authority to manage, direct, or execute investment or fund-related decisions" means that it is not necessary for the advisory staff to be SEC-certified investment advisors?

**Answer** The consultant staff are not required to be SEC-Certified.

---

**1.2** In the Proposal Evaluation and Selection Process section of the RFP, there are blanks provided for the % weights of each section. Can the City provide its proposed weights for these selection criteria?

**Answer** The proposed weight for selection criteria has been posted as an Addendum.

Below is a summary:

Category - Weight

1. Public-Sector Community Engagement Experience on Restricted or Designated Funds - 20%

2. Facilitation and Advisory Capability - 15%

3. Understanding of Public Governance & Decision Authority - 15%

4. Experience Presenting to Elected Bodies - 10%

5. Approach & Methodology - 20%

6. De-Emphasized Factors - 0%

7. Cost Proposal - 15%

8. Overall Best Value - 5%

TOTAL - 100%

### 1.3 Can the City share its proposed timeline for this assignment?

**Answer** The Consultant shall develop and submit a detailed work plan including proposed timeline for final deliverable.

---

### 1.4 Does the City have an estimated budget for this project?

**Answer** The City Council indicated a fiscal impact of \$300,000, however, the RFP does not impose a limit.

---

### 1.5 We understand that the City recently brought in a municipal financial advisor to discuss potential scenarios for the fund. Is the financial advisor still engaged in this process? Would it be possible to share any results?

**Answer** The City may not be able to share any information from other consultants unless it is presented at any of the public meetings.

---

### 1.6 Is the previous proposal to use some of the funds for the unfunded pension liabilities still an option?

**Answer** There no final decision made about how to use these funds at this point; however, none of the previously discussed options has been excluded either.

---

### 1.7 Is it possible to get a copy of the settlement agreement (or portions with language regarding fund usage and restrictions)?

**Answer** The Settlement Fund revenues are received in General Fund and have no restrictions

---

### 1.8 Could the City please clarify what is considered unacceptable exceptions to the general terms and conditions?

**Answer** The City considers exceptions to the General Terms and Conditions unacceptable if they materially alter risk allocation, limit the City's legal protections, or conflict with applicable federal, state, or local law. Proposals containing such exceptions may be deemed non-responsive and rejected at the City's discretion.

---

## 1.9 Is there a not-to-exceed amount for this proposal?

**Answer** The City Council indicated a fiscal impact of \$300,000, however, the RFP does not impose a limit.

---

## 1.10 o Which underrepresented communities are most critical to reach out to and involve in the process? o Given the heightened issues with trust in the current political environment, particularly for immigrant communities, how can you assist us in building the right bridges to successfully engage these communities? o What do you estimate to be the number of community level stakeholders that will need to be engaged across the 6 community dialogue sessions?

**Answer** Richmond is a diverse community (race, ethnicity, socio-economic status, geography, language, etc.). The City also has a sizeable unhoused community. The Consultant can use the City's neighborhood councils to get access to these communities. <https://www.ci.richmond.ca.us/267/Neighborhood-Councils>. City staff have built relationships with community-based organizations and neighborhood councils, and are ready to assist with sharing information regarding meetings, etc. City staff can also assist the Consultant by making introductions to various organizations.

---

- 1.11** o The cost section states no costs may be included for “investment advisory, financial management, or fund management services,” (RFP, p.15) yet the scope requests “advise on investment options to maximize earnings.” (RFP, p.4). Can you please clarify what is not permitted, and whether subcontracting is allowed for this piece of work? o Are proposers allowed to provide high-level policy options only (e.g., investment vehicles, risk categories, governance models)? Is the consultant explicitly prohibited from recommending specific financial instruments? o For the 6 in-person sessions, can you please confirm if there are any specific languages required for translation and interpretation beyond English/Spanish (e.g., any language from the Asian continent) and can the city provide translation services if needed? o Is there an expectation for stipends/incentives (besides food and childcare) for participants in the in-person sessions? o What are the City’s requirements for the “online platform for residents to submit feedback” (RFP, p.5): is a simple survey tool fine, should it be hosted on City infrastructure... etc.? o Will the city provide space or facilities for these sessions, or should we include that cost in our budget? o Will the city provide participant incentives for community members to travel to and access these sessions, or should we include that cost in our budget? o Does the city have existing communications channels we can leverage for outreach?

- Answer** The consultant is expected to propose options to maximize earnings, however, the consultant will not be managing the investments. For allowable investment options, the City’s approved investment policy shall be followed. Subcontracting is allowed.
- o The Consultant is expected to provide high-level policy options, and can recommend specific financial instruments.
  - o No other language beyond English/Spanish is required for translation.
  - o No, financial incentives are not expected for this exercise.
  - o The Consultant is expected to select the most effective medium based on their experience. The link or a webpage for the survey can be hosted on the City’s website.
  - o The Consultant can rent the City’s public facilities such as City Council Chambers and community centers.
  - o The City will not provide any incentives to community members for participation.

o The City has various social media platforms, public television, and a YouTube channel and these modes can be leveraged for outreach.

---

**1.12** o The Schedule of Events says proposals are due March 11 at 2:00pm PST, but later it states the proposal must be received by March 3 at 2:00pm PST. Which date is correct? o The RFP states that final deliverables should be submitted by “month, day 2026” with no specific date (p.8). Can you clarify that date, and what is the expected project length of this contract, assuming it will start after April 21st (contract award date)? o Please confirm whether several subconsultants are permitted for specialized services (e.g., translation or investment advice) and whether any limits apply beyond needing City approval. o Is there an estimated budget range or maximum target the City has in mind for this project? o What are the requirements or the material to submit to request a sub-contractor to be part of our consortium? o The RFP references multiple City of Richmond ordinances and states that these are incorporated into the Contract Documents. Could you please clarify whether proposers are required to submit any signed statements, forms, or other documentation demonstrating compliance with these ordinances as part of the proposal package? Or are these compliance obligations applicable only to the contractor after award?

**Answer** 'oRFP is due March 11, 2026 at 2:00pm PST. Consultant shall develop and submit a detailed work plan including proposed timeline for final deliverable.  
oSub-consultants are permitted.  
oThe City Council indicated a fiscal impact of \$300,000, however, the RFP does not impose a limit.  
oRequirements for sub-consultants shall be same as the prime.  
oCompliance with City Ordinance is a required under the terms of Contract and only applicable after award.

---

**1.13** With regards to the input in-person sessions described on page 5, could the City clarify what level of support the City may be able to provide for childcare and food services during the engagement events? For example, do you have partnerships with local vendors who provide childcare services, or are you looking for your consultant to develop those relationships?

**Answer** The City doesn't have a contract with outside vendors to provide childcare services. The Consultant is expected to arrange those services. If needed and available, the City may be able to provide City staff to support with childcare services. It is expected that the Consultant will budget for and purchase food/snacks, as appropriate, for community meetings. If assistance is needed with navigating local restaurants, city staff may be of assistance.

---

**1.14** Please confirm the due date for this Proposal - March 11, 2026 is stated in the Portal; however, on Page 17 of the RFP, the date is March 3, 2026.

**Answer** The proposal Due date is March 11, 2026 at 2:00pm PST

---

**1.15** Is the City seeking the consultant to be virtual, in-person, or a mix of both?

**Answer** The City is expecting the engagement exercise through a mix of both virtual and in-person meetings.

---

**1.16** Has the community advisory board already been established, or is the consultant expected to recommend its structure?

**Answer** No board is established yet, the selected consultant is expected to recommend a board structure if community desires one.

---

**1.17** What is the period of performance? Is all work by the consultant expected to be completed by the end of 2026 as shown on Page 8 of the RFP or should the consultant propose the timeline for completion and delivery as part of this engagement?

**Answer** The Consultant shall develop and submit a detailed work plan including proposed timeline for final deliverable.

---

**1.18 Does the City anticipate future follow-on contracts (e.g., implementation, administration, compliance monitoring), or is this strictly a one-time advisory engagement?**

**Answer** The current RFP is for a one-time advisory engagement. Any future contracts will be determined pending the City Council direction.

---

**1.19 Does the City have an established Language Access Plan or LEP Plan that demonstrates required languages to be provided during the in-person and for printed communication?**

**Answer** The City does not have a language access plan, however, conventionally most public communication is in English and Spanish.

---

**1.20 For the "at least 6 input in-person sessions in accessible locations across all districts, ensuring interpretation services are provided and all materials are translated." — will the City allow the consultant to use designated City-owned facilities or will the consultant be required to secure their own facility for these in-person sessions?**

**Answer** City will allow use of the designated City facilities and we assist in reserving those facilities

---



Search & Bid on Thousands of Contracts

[www.vendorline.com](http://www.vendorline.com)