

RFP FOR PROFESSIONAL SERVICES

Request for Proposals (RFP)

**Strategic Plan Update
For the Port of Hueneme**
(Owned by the Oxnard Harbor District)

RFP: POH-FY20-001
August 29, 2019

DEADLINE FOR RFP ONLINE Q&A: 3:00pm September 20th, 2019

DEADLINE FOR RFP SUBMISSION: 3:00pm September 30th, 2019

SUBMISSION LOCATION: 333 Ponomo St. Port Hueneme, CA. 93041

Note: Addenda will be faxed or emailed to all persons on record as having picked up this RFP. Please call 805-488-3677 to add your contact information to the list of bidders.

STRATEGIC PLAN UPDATE

For the Port of Hueneme

(Owned by the Oxnard Harbor District)

RFP: POH-FY20-001

The Port of Hueneme (PORT), owned by the Oxnard Harbor District (OHD), is soliciting qualifications from interested firms to provide the Port with professional services in support of updating its STRATEGIC PLAN 2020 to STRATEGIC PLAN 2030.

The Port's goals and objectives in this RFP are guided by the need to:

- Update its Master Strategic Plan 2020 to Strategic Plan 2030
- Augment strategy from the 2020 Plan in the Port's strategic pillars of:
 - Business Retention and Growth
 - Environment
 - Marketing
 - Innovation and Technology
 - Strategic Partnerships
- The final deliverable should contain strategy to inform the next level of:
 - Business development targets;
 - Environmental goals;
 - Marketing objectives and strategies;
 - Maritime Advanced System Technology (MAST) enhancement; and
 - Strategic partnerships and community outreach plan
- The Update shall include a proposed operational budget associated with the 2030 Strategic Plan
- The Update shall include a proposed capital budget associated with the 2030 Strategic Plan
- The Update shall include a variety of financing solutions including joint ventures and grants
- The Update shall include multiple stakeholder meeting interviews to inform the plan, 2 community workshops and a public board meeting where public can testify and comment on the final 2030 Strategic Plan Draft

The type of contract for these services is a Professional Services Agreement (PSA). The successful Firm, Team or Joint Venture will prepare task-specific cost proposals specific to the Strategic Plan Update. Proposals shall provide a scope, cost, and schedule. The Port reserves the right to negotiate scope, cost and schedule based on the submission and the Port's budget for the Strategic Plan Update.

SECTION 1. ABOUT THE PORT

The Port of Hueneme (Port) is the only deep-water harbor between Los Angeles and the San Francisco Bay and is a US Port of Entry. The Port plays a vital role in the intermodal logistics supply chain, and is critical to the economic vitality of Ventura County and Southern California. The Port facilitates the transport of over \$9.5 billion in cargo, generates a \$1.7 billion economic

impact, and provides more than 15,834 direct, indirect, induced and influenced jobs regionally. The niche markets that the Port serves include the import and export of automobiles, non-automotive roll-on roll-off cargo, project cargo, fresh produce and liquid bulk. Its unique positioning near the Santa Barbara Channel and fertile fishing grounds has also made the Port the primary support facility for the offshore oil industry along California's Central Coast region and an active squid offloading hub. In fiscal year 2018, the Port handled over 1.6 million metric tons of cargo transported on calls from over 350 deep draft ocean-going vessels. This strong performance generated the Port's highest revenue year in its 83-year history.

SECTION 2. BACKGROUND ON STRATEGIC PLAN 2020

In 2014, the Port of Hueneme embarked upon an important journey developing policy, engaging in workshops and strategy sessions to create the Port of Hueneme 2020 Strategic Plan (Strategic Plan). Five Leadership Priorities were articulated to develop the Strategic Plan including:

- Business Retention and Growth;
- Marketing
- Environment
- Innovation and Technology; and
- Strategic Partnerships.



This process established a visioning tool for the Port administration, reinforced its mission statement, and established goals and strategies to guide Port operations, business retention and growth, and development of potential future capital investments. On October 12, 2015, after more than a year of interviews, workshops, community outreach, and public meetings, the Board of Harbor Commissioners adopted the 2020 Strategic Plan.

The Strategic Plan provided the Port a 5-year planning horizon with a 20-year operations and economic development vision. Through the planning process, the Port identified strategic near-term and scenario-based long-range capital investments that will keep the Port competitive in a dynamic and changing global market.

BUSINESS RETENTION AND GROWTH: The Port has successfully regained citrus market exports through its business growth initiative and will continue to see charter and reefer ships utilizing the Port of Hueneme during peak seasons to Asia among other trade lanes. The ability to export agricultural products through the Port will likely require the development of a container operation, in turn requiring capital investment for cranes and terminal/wharf improvements for which the Port is aggressively seeking federal, state, and private investment to build.

Other business opportunities include increased imported fruit operations and other cargo from Central and South America, short-sea shipping, the development of project cargo exports and the growth of auto export and import accounts. Fostering the sister port relationship with the Port of

Ensenada, Port of Quetzal, Guatemala and working closely with ProMexico and Baja, California is part of that strategy.

The 2020 planning process involved the development of a capital outlay analysis and financial modeling to best identify how to secure new opportunities. Planned improvements included harbor deepening which is taking place in 2019-2020, a container-friendly facility, improvements to on-dock rail and possible property acquisitions.

MARKETING: The development of the 2020 Strategic Plan was also aligned with a reenergized approach to the Port's marketing efforts. During its rebranding campaign in 2013, the Port rolled out a new identity platform that included a new logo and a very robust approach to marketing. The Port has also developed a business development tool kit and upgraded its website and electronic communication capabilities to best heighten its global profile to both retain and attract new business.

ENVIRONMENT: The 2020 Strategic Plan also spurred the development of the Port's Environmental Management Framework (Framework). This Framework focuses on six specific areas of the environment including sustainability, community engagement, marine resources, soil/sediment, water quality, and air quality. The Framework is the guiding document for the Port's efforts to be good stewards of the environment. It tracks the progress the Port makes towards its goals in each of the six areas. The Port has made great strides in becoming green in each of these categories including:

- Implementing shore-side power to reduce emissions from berthed ships
- Partnering with the Smithsonian Institute to study invasive aquatic species
- Installing LED lighting
- Moving toward a zero-waste goal as a public agency
- Replenishing Hueneme Beach with clean dredged sand to fight beach erosion
- Reducing GHG generation through zero and near zero emission on-port cargo handling equipment and vehicles
- Improving water quality through stormwater runoff management
- Becoming the first Port in California to earn a Green Marine Certification

In 2017, the Port launched a clean air plan tailored to the both and its emissions. This plan is called Port of Hueneme Reducing Emissions Supporting Health (PHRESH). This innovative plan is being developed in conjunction with our local air quality regulatory agency the Ventura County Air Pollution Control District (VCAPCD). This partnership has been paramount to developing a comprehensive plan that will identify and target the pollutants which the Port can aggressively reduce. Most ports develop clean air action plans as a result of air quality violations; however, the Port pro-actively partnered with the local APCD to achieve the



most impactful improvements to Ventura County’s local air quality. The Port’s environmental strides were recently recognized with awards including: Greenest Port in the United States at the Green Shipping Summit and the Comprehensive Environmental Management Award from the American Association of Port Authorities. More information on the Port’s environmental initiatives can be seen here: https://www.youtube.com/watch?v=eVQAGI_D920.

The Port is increasing the utilization of electrical power as a fuel source for cargo handling equipment on Port. In the next decade significant alterations in Port infrastructure and operations will be undertaken as part of this transition to a lower emission/lower carbon fuel future. Zero and near zero emission equipment will become the standard and the Port will undertake the planning and execution of the repowering or replacement of all diesel equipment on Port. This paradigm shift in fueling will require not only substantial changes in the equipment, but equally if not more important, the fuel infrastructure providing fuel to that equipment. Large projects will be undertaken to install sufficient electrical power infrastructure around the Port, including transformers, switchgear, vaults and plugs to power this low emission future.

INNOVATION AND TECHNOLOGY: In 2014 the Port launched its Maritime Advanced System Technology (MAST) program as the mechanism to excel in the domain of innovation and technology. The concept emerged as the Port serve as an incubator 24-7 to pilot emerging technologies.

MAST Vision: To foster ideas, innovation and leading-edge technologies for the advancement of ports and the maritime environment.

MAST Mission: We join a network of leading academic, research, test & evaluation, and in-service engineering centers to further expand the nation’s ability to provide solutions to relevant challenges in the maritime domain. By leveraging the unique geographic, operational and environmental assets located at the Port of Hueneme, MAST invites entrepreneurs with an optimized solution a surrounding for sustained research, experimentation and test programs.

In 2019, the Port announced a partnership with Economic Development Collaborative, Matter Labs, and Naval Base Ventura County to bring together a network of leading academic, research, test & evaluation, and in-service engineering centers to further expand the nation’s ability to provide solutions to relevant challenges in the maritime domain. By leveraging the unique geographic, operational and environmental assets located at the Port of Hueneme, MAST invites entrepreneurs with an optimized solution a surrounding for sustained research, experimentation and test programs. MAST is intended to

- Be an incubator for new technology
- Attract venture capital
- Tap the entrepreneurial spirit of Ventura County.

STRATEGIC PARTNERSHIPS: The Port's Strategic Plan 2020 lays out strategy to strengthen existing and build new relationships. In addition to the local and state governmental agency partnerships, the Port has been intentional on building relationships with various community partners. For example, the Port partnered with the Oxnard Union High School District to teach a 12-week Global Trade and Logistics course for high school junior and seniors. The Port also provides over 120 educational tours for elementary students. The Port hosts an annual Banana Festival free for the public, and sponsoring events within the local community to support safety, economic development, education, and health.



SECTION 3. PROPOSAL SUBMISSION INFORMATION

PROPOSALS

All proposals are to be submitted no later than 3:00 PM on **September 30, 2019** at the Port's Administrative offices located at 333 Poinoma St. Port Hueneme, CA 93041. Each proposal must be in a clearly marked, sealed envelope in accordance with all submission requirements set forth in this RFP. **Late proposals will not be accepted.**

The Port will consider only responsive proposals from responsible firms for a contract award. A responsive proposal is a proposal that complies with requirements stated in this RFP. A responsible firm is one that demonstrably possesses the skill, ability, and integrity necessary to faithfully perform business development, market analysis, feasibility analysis, capital analysis, financial analysis and strategic planning services for the Port of Hueneme. The Port at its sole discretion will award the contract to the candidate submitting the most advantageous proposal(s), taking into consideration each proposal's relative merits.

The Port will determine the most advantageous proposal from a responsible and responsive candidate. The Port reserves the right to waive any irregularity, informality, or technicality in the proposals in its best interest.

A candidate may correct, modify, or withdraw a proposal by written notice received in the office designated herein for proposal submission prior to the time set for the opening of proposals. The Port may waive informalities or allow the candidate to correct them.

The Port reserves the right to cancel this Request for Proposals or to reject any proposal received, any time before a contract is approved by the Board of Harbor Commissioners of Port and executed by the Port and the person(s) making the proposal.

AWARD

The Port at its sole discretion will award to a bidder(s) that are most responsive to the bid and have a proposal in the clear interest of the Port. A contract will only result when a proposal has been approved by the Board of Harbor Commissioners and a Professional Services Agreement is signed between the Port and the person(s) submitting the proposal.

CONTRACT

The type of contract for these professional marketing services is a Professional Services Agreement (PSA) with Service Agreements. The person(s) with whom the Port contracts (Contractor) will prepare task-specific costs to the Port for negotiation and confirmation of scope, cost and schedule, and will become effective when the Service Agreement has been executed by Port and Contractor.

SECTION 4. SCOPE OF WORK

The work under the PSA may entail, but is not necessarily limited to the following list of services:

- A.** Assemble Port's various strategic planning documents and integrate confirmed strategies into the Strategic Plan 2030 Update;
- B.** Perform additional business development strategy analysis; Provide industry/market trend updates and reports as relevant to business opportunities for the Port of Hueneme;
- C.** Stakeholder Outreach
 - a. Conduct interviews of customers, community partners, port partners and stakeholders (during 2020 Strategic Planning we had over 45 interviews)
 - b. Organize and hold 2 (Two) Community/Stakeholder meetings to present process and outline key strategies in the 2030 draft plan and hear comments
 - c. Organize and hold 1 (One) Public Hearing regarding 2030 Plan
- D.** Update the Plan's strategies in the pillar areas of:
 - a. Business Retention & Growth
 - b. Environment
 - c. Marketing
 - d. Innovation & Technology
 - e. Strategic Partnerships
- E.** Identify Development Plan and Capital Investment Strategy
 - 1. Perform a profile of the existing operations focusing on the current capacity of the terminal in terms of land, berths, equipment, internal traffic flow and surface transportation access. Compare projected cargo activity of the existing tenants to

- existing terminal conditions to determine what terminal investments are required to accommodate potential market opportunities. Both structural as well as non-structural capacity enhancements shall be considered, as well as need for land acquisitions and lease revisions. The analysis shall also address the current deferred maintenance requirements as well as market driven investments. Develop terminal layouts equipment, real estate and infrastructure needs. Formulate capital budget and investment strategy.
2. Develop a detailed baseline financial model for each current terminal operation. The model should include a revenue module as well as a cost module that provide a baseline to analyze the historical performance of the Port by terminal and line of business and then the projected financial performance under various market development scenarios, and associated capital costs. Provide the Port with a model to assess various financing alternatives for the identified market and terminal driven investments. These alternatives include, but are not limited to the development of longer term lease agreements, public private partnerships and the possible development of a long term concession.
 3. Identify inside and outside the gate investments and strategies for all pillars of the Strategic 2030 Plan Update. Investments and strategies need to include, but not limited to, cost-effective capital improvement projects to meet near future environmental regulatory requirements, and incorporate the Port's electrical master plan into the overall Strategic 2030 Plan.

F. Project Deliverables

- a. Electronic Version of Plan
- b. 35 Copies of the Plan
- c. Power Point of the Plan
- d. Documented results of the stakeholder interviews, community meeting and any other addend ices

SECTION 5. PROPOSAL SUBMISSION REQUIREMENTS

ONLINE Q&A

All questions will be submitted online via PlanetBids Q&A and open to all bidders. Deadline for Q&A is **3:00pm September 20th, 2019**.

SUBMITTING PROPOSALS

Proposal submissions must be made in accordance with this RFP. Please submit a proposal that includes all capabilities and cost of providing services.

The Port's intent is to retain a company(s) capable of providing services listed in the RFP. Please submit pricing according to the firm's capabilities and the scope of work.

Each proposer is expected to examine all instructions pertaining to this RFP contained herein. Failure to do so will be at the proposer's risk.

There shall be no subcontracting of the work designated in the PSA or individual Service Agreements without the prior written consent of the Port.

Proposals must be delivered to the Port at the address below no later than **3:00 PM on September 30, 2019**. Late proposals will not be accepted.

Submit proposals by mail or hand delivery to:

Cam Spencer, Public & Government Relations Manager
Oxnard Harbor District
333 Ponomo Street
Port Hueneme, CA 93041

The following information must appear on each envelope: Bidders Name:
Proposal # POH-FY20-001

Number of Copies:

- One (1) original plus three (3) copies

Envelopes marked "Proposal # POH-FY20-001" will be opened at 3:00 PM on September 30, 2019. The proposal contents will not be disclosed until the evaluation process is completed, or until the time for acceptance specified in the RFP, whichever occurs first. At the opening of proposals, the Port shall prepare a register of proposals for public inspection.

PROPOSAL CONTENT

The "Proposal # POH-FY20-001" must consist of the following Documents:

- 1. Firm Information Form** (Form Attached)
- 2. A presentation of scope of work:** Interested Firms should prepare a written Proposal for Services based on the scope of work provided in Section 4 herein. Proposals should clearly demonstrate an understanding of the Scope of Services and should reflect the proposer's ability to perform the work requested. Include the following sections:

I. Introduction:

- a. Introduce the Firm, Team, or Joint Venture to include the relevant history, overall services and location of the Firm, Team, or Joint Venture.

II. Capabilities:

- a. Describe capabilities of the Firm to provide services and complete the work
- b. Provide a description of the types of services
- c. Explain depth and breadth of services and resources

III. Strategic Approach:

- a. Identify the Firm's proposed strategic approach to project implementation
- b. Identify how the Firm communicates and presents work to clients

IV. Project Management:

- a. Describe the ability of the Firm, Team, or Joint Venture to successfully and timely complete the work
- b. Identify location of the resources
- c. Identify capability of the Firm to manage contracted task orders
- d. Explain ability to stay on task and on budget

V. Creativity:

- a. Describe innovative technologies and/or special knowledge and capabilities
- b. Describe software usage capabilities of the Firm.

VI. Project Cost Proposal and Billing Schedule

VII. Project Schedule

3. **Statement of Intent** focusing on a description of the prime consultant/firm and its organizational structure, size, capabilities, special qualifications, and key personnel promoted by the consultant as being particularly suited for undertaking and executing this project.
4. **A Qualifying Projects List** from the consultant should be carefully selected from the most recent history and should demonstrate relevant experience. This list shall include relevant current and completed projects within the past five (5) years. No more than 20 projects should be listed. This list should be submitted with the "POH-FY20-001: Proposal."
5. **A Client Reference List** with contact person names, addresses, telephone numbers, and a brief project description for completed work within the last five (5) years. Each firm listed within the proposal must provide no less than three (3) references. (Reference Form Attached)
6. **Up to five (5) work examples** can be provided to demonstrate the proposer's expertise as relative to the RFP.
7. **A Detailed List of Hourly Rates** for professional services, and **All Other Anticipated Costs** required in the performance of this PSA with the costs signed by an individual authorized to bind the candidate contractually.
8. **RFP POLICIES AND PROCEDURES**
 1. Anyone who intends to submit a proposal must contact the Port directly and specifically request a copy of this RFP by mail, phone or e-mail. Contact Cam Spencer at the Port of Hueneme Office:

Cam Spencer, Public & Government Relations Manager
Oxnard Harbor District
333 Ponomo Street
PO Box 608
Port Hueneme, CA 93044

Phone: (805) 488-3677

Email: cspencer@portofh.org

The Port has responsibility for maintaining a control list of all potential proposers.

2. The Port reserves the right to amend this RFP. The Port reserves the right to reject any or all of the proposals, or any part thereof, submitted in response to this RFP, and reserves the right to waive formalities, if such action is deemed to be in the best interest of the Port. The Port reserves the right to request additional information from any proposer.
3. This RFP is not intended and shall not be construed to commit the Port to pay any costs incurred in connection with any proposal or to procure or contract for any services.
4. The decision to enter into a contract with any person(s) submitting a Proposal shall rest with the sole discretion of the Port and shall be based on the proposer's ability to provide quality services and to comply with all applicable laws, rules, and regulations. Any person submitting a proposal must have a representative available to physically meet at the Port of Hueneme, CA within a week's notice should a meeting be required with the Port.
5. Each proposal will be examined to determine whether it is responsive to the requirements and requested professional services in this RFP.
6. While the Port is under no obligation to contact companies for clarifications, it reserves the right to do so. Depending on the number and quality of the proposals submitted, the Port, at its sole discretion, may elect to interview all or some of the companies during the selection process and to request presentations, including demonstrations of products and services.

ATTACHMENTS

- **Ownership Information Form**
- **Reference Form**

OWNERSHIP INFORMATION FORM

PLEASE FURNISH FOLLOWING INFORMATION REGARDING BIDDER:

(1) If a Proprietorship:

Name of Owner _____
Business Address _____
Zip Code _____ Telephone No. _____
Home Address _____
Zip Code _____ Telephone No. _____

(2) If a Partnership, Full names and addresses of all partners:

Name _____
Address _____
Zip Code _____ Telephone No. _____
Name _____
Address _____
Zip Code _____ Telephone No. _____
Business Address _____ Zip Code _____
Tel. No. _____

(3) If a Corporation:

Full Legal Name _____
State of Incorporation _____ Qualified in California? Yes _____ No _____
Names of Shareholders _____
Names of Officers _____

Principal Place of Business

Street / P.O. Box _____

City/Town State Zip _____
Telephone No. _____

Place of Business

Street / P.O.Box _____

City/Town State/Zip _____
Telephone No. _____

(4) If a Limited Liability Company:

Full Legal Name _____
State of Organization _____
Names of Managers _____
Principal Place of Business

Street / P.O. Box _____

City/Town State Zip _____
Telephone No. _____

REFERENCES FORM

Proposer: _____

Customer References:

1. Name: _____
Phone: _____
Address: _____

Business Relationship: _____

2. Name: _____
Phone: _____
Address: _____

Business Relationship: _____

3. Name: _____
Phone: _____
Address: _____

Business Relationship: _____