

REQUEST FOR PROPOSALS (RFP)

Strategic Plan Update Consulting Services

Issued by: Monterey County Water Resources Agency

RFP No.:

Issue Date: November 19, 2025

Proposal Due Date: January 8, 2026, at 2:00pm

1. INTRODUCTION

The Monterey County Water Resources Agency (“Agency”) is seeking proposals from qualified consultants or consultant teams (“Consultant”) to assist with updating the Agency’s existing Strategic Plan. The updated plan will provide a clear and actionable roadmap to guide the Agency over the next five years.

2. BACKGROUND

The Agency is a special district that provides services related to the control of flood and storm waters in Monterey County, conservation, protection of water quality, reclamation of water and the exchange of water. The Agency’s mission is to manage water resources sustainably while minimizing impacts from flooding for present and future generations.

The Agency was established in 1947 as the Monterey County Flood Control and Water Conservation District (MCFCWCD) and organized as a division of the Public Works Department of the County of Monterey through the Monterey County Flood Control and Water Conservation District Act (Chapter 669 of the Statutes of 1947). In 1991 Monterey County Flood Control and Water Conservation District was transformed into Monterey County Water Resources Agency via the Monterey County Water Resources Agency Act (Agency Act), California Water Code, Appendix 52 (Monterey County Water Resources Agency 2022a).

The Agency is responsible for various water-resource related facilities and lands located within Monterey County and northern San Luis Obispo County, which include: two high hazard earthen dams, a recycled water system for irrigation, drainage pump stations and channels, a river diversion facility, and groundwater wells. The Agency is also responsible for multiple long-term groundwater monitoring programs. The Agency’s FISCAL YEAR 2025-26 Adopted Budget totaled \$43.5 million in expenditures and is comprised of fourteen

funds including Special Assessment Funds, Flood Assessment Funds, Debt Service Funds, and Other Funds.

The Agency is governed by a 5-member Board of Supervisors elected by County residents with legislative and executive authority. The Supervisors appoint the General Manager and along with other organizations, appoint a Board of Directors of the Agency. This Board of Directors consists of nine members and is made up of members appointed by the Monterey County Farm Bureau, Monterey Grower-Shipper Association, the County Agricultural Advisory Committee, five members appointed by the County Board of Supervisors (one from each district), and a member appointed by the Mayor Select Committee. The Board of Directors has the following responsibilities, which they carry out in collaboration with the assistance of Agency staff:

- Establishing short- and long-term policy objectives for the Agency, including a strategic plan, subject to review by the Board of Supervisors;
- Preparing an annual budget;
- Holding public hearings on proposed budget; and
- Approving all contracts for which funds have been budgeted.

The Agency's current Strategic Plan was adopted in 2020 and outlines goals related to infrastructure maintenance, planning and new projects, financial sustainability, effective core services and organizational improvement, and community relations. Since that time, the Agency has experienced changes in governance and community expectations.

To ensure continued alignment with current and future priorities, the Agency intends to engage a professional consultant to **review, evaluate, and update the Strategic Plan** with input from the Board of Directors, staff, and key stakeholders.

3. PURPOSE AND OBJECTIVES

The purpose of this RFP is to solicit proposals from qualified consultants to:

- Review the existing Strategic Plan and assess progress to date
- Conduct an environmental scan of internal and external factors affecting the Agency
- Engage the Board, staff, and community stakeholders in a collaborative planning process

- Update the Agency’s mission, vision, goals, and objectives as needed
- Develop a concise, actionable, and measurable Strategic Plan for adoption by the Board

The final Strategic Plan should be an implementable document that aligns the Agency’s strategic priorities with its operational, financial, and capital planning frameworks.

4. SCOPE OF WORK

The Consultant will be expected to perform the following tasks:

Task 1 – Review and Assessment

- Review the existing Strategic Plan and other relevant documents (e.g., capital improvement plans, budgets, annual reports, and water master plans) that include Agency priorities.
- Identify completed objectives, ongoing initiatives, and new or emerging issues.
- Conduct an environmental scan of key internal and external trends affecting the Agency.

Task 2 – Stakeholder Engagement

- Develop a stakeholder engagement plan in collaboration with Agency staff that includes up to 12 interviews, 2 surveys, and 5 stakeholder meetings.
- The goal is to seek input about vision, mission, values, goals and strategies. Additionally the analysis should include querying the strengths, weaknesses, opportunities and threats facing the Agency.
- Facilitate engagement with:
 - Board of Directors
 - Agency management and staff (survey completed May 2025)
 - Community partners
 - Other key stakeholders as identified
- Summarize stakeholder input to inform updates to strategic priorities.

Task 3 – Strategic Framework Update Workshops

- Facilitate a workshop with the Board of Directors, General Manager, senior staff and others, as desired, to review the information gathered in the previous activities and to:
 - Review and discuss the results of stakeholder input.
 - Review the current vision statement and mission statement, and core organizational values and decide whether they remain relevant or need revision.
- Facilitate a second workshop with the Board of Directors, General Manager, senior staff and stakeholders to:
 - Finalize the Agency vision statement and mission statement and core organizational values
 - Update or confirm strategic goals and develop supporting objectives and initiatives.
 - Align the strategic framework with the Agency's policy direction, resources, and future challenges.
 - Discuss performance measures or key indicators and outcomes that will serve as the basis for measuring progress in plan implementation
 - Identify ways to communicate the outcomes of the strategic planning process

Task 4 – Draft and Final Strategic Plan

- Prepare a **Draft Updated Strategic Plan** incorporating findings from prior tasks.
- Present the draft plan to staff, the Agency's Planning Committee, Board of Directors, and Board of Supervisors for review.
- Incorporate revisions and prepare a **Final Strategic Plan** suitable for public release and adoption.
- Present the final plan to staff and the Board of Directors for adoption.

Task 5 – Implementation and Performance Measures

- Develop an implementation plan with timelines, responsible parties, and key milestones.
- Recommend performance indicators or dashboards for tracking progress on an annual basis, at a minimum.

- Prepare and facilitate an implementation workshop for staff to proceed with executing the plan.

5. DELIVERABLES

The Consultant shall provide, at minimum:

1. Project Work Plan and Schedule
2. Environmental Scan and Stakeholder Engagement Summary
3. Draft Updated Strategic Plan
4. Final Strategic Plan (editable and publication-ready formats)
5. Implementation and Performance Measurement Framework

6. PROJECT TIMELINE

Milestone	Target Date
RFP Issued	11/19/2025
Deadline for Questions	12/12/2025
Proposals Due	1/6/2026
Interviews (if conducted)	1/21/2026
Consultant Selection	1/28/2026
Contract Award	2/17/2026
Project Kickoff	3/2/2026
Draft Plan Delivered	9/1/2026
Final Plan Delivered	10/21/2026

Note: Timeline is subject to change at the Agency's discretion.

7. CONSULTANT QUALIFICATIONS

The ideal Consultant will demonstrate:

- Proven experience facilitating strategic planning processes for water agencies or closely related public agencies
 - Knowledge of the water industry, including governance, operations, finance, and regulatory issues
 - Strong facilitation, communication, and consensus-building skills
 - Experience working with elected boards and public sector stakeholders
 - Ability to produce clear, professional written products
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8. PROPOSAL REQUIREMENTS

Proposals must include the following sections:

1. **Cover Letter** – A brief introduction summarizing the Consultant’s understanding of the project.
 2. **Firm Profile** – Background, size, and areas of expertise.
 3. **Project Team** – Identification of key personnel, roles, and qualifications.
 4. **Approach and Methodology** – Description of how the Consultant will complete the tasks outlined in this RFP.
 5. **Work Plan and Schedule** – Proposed timeline with key milestones and deliverables.
 6. **Relevant Experience** – Descriptions of similar strategic planning projects, preferably for water agencies or public agencies.
 7. **References** – At least three (3) client references for comparable work.
 8. **Cost Proposal** – Detailed budget including hourly rates, estimated hours per task, and reimbursable expenses.
 9. **Acceptance of Terms and Conditions** – A statement of acceptance of the Agency’s standard contract terms and conditions (see Appendix A – Professional Services Agreement). Any proposed exceptions must be clearly identified and submitted with the proposal.
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9. PROPOSAL SUBMISSION

Proposals must be received no later than **2:00 pm on January 8, 2026**

Submit proposals electronically in PDF format to:

Email: mcwater@countyofmonterey.gov

Subject Line: *RFP – Strategic Plan Update Consulting Services*

Late submissions will not be considered.

Questions regarding this RFP must be submitted in writing to **Shaunna Murray, MurraySL@countyofmonterey.gov** by **December 12, 2025**. Responses to questions will be posted on the Agency’s website at [Insert URL] by **December 19, 2025**

10. SELECTION PROCESS

Proposals will be reviewed by a selection committee and evaluated according to the following criteria:

Evaluation Criteria	Weight
Understanding of Agency’s Needs	20%
Relevant Experience and Qualifications	25%
Quality of Proposed Approach and Methodology	25%
Cost Proposal	20%
References and Past Performance	10%

Top-ranked firms may be invited for interviews or presentations before final selection. The Agency reserves the right to negotiate the final scope, schedule, and fee with the selected Consultant.

11. TERMS AND CONDITIONS

- The Agency reserves the right to reject any or all proposals, to waive irregularities, and to accept the proposal deemed most advantageous.
- All submitted materials become property of the Agency.
- The selected Consultant will be required to maintain appropriate insurance coverage and comply with all applicable laws and regulations.

- Any contract resulting from this RFP will be subject to the Agency's standard professional services agreement as provided as Appendix A to this RFP
- By submitting a proposal, the Consultant acknowledges that they have reviewed the agreement and, if selected, are prepared to enter into the agreement substantially in the form attached, subject to minor modifications as approved by the Agency.

12. CONTACT INFORMATION

Project Manager: Shaunna Murray, Deputy General Manager

Email: MurraySL@countyofmonterey.gov

Phone: (831)755-4860

Website: mcwater.info

Appendix A — Professional Services Agreement

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