Big Bear Municipal Water District

Lake Management

Board of Directors
Steve Ludecke – Division 1
Craig Peterson – Division 2
Craig Brewster – Division 3
Mark Lee – Division 4
Tom Bradford – Division 5

REQUEST FOR PROPOSALS FOR

STRATEGIC PLAN SERVICES

PO No.: 2026-05

Issued By:
BIG BEAR MUNICIPAL WATER DISTRICT

Proposal Deadline:	**December 11, 2026 at 3 PM**. Quotes can be submitted electronically to edonoho@bbmwd.net or sent by mail to PO Box 2863, Big Bear Lake, CA 92315
Strategic Plan Deadline:	**March 26, 2027 at 3 PM**
Information:	Elsa Donoho, Office Manager/Board Secretary **Email: edonoho@bbmwd.net, Phone:** 909-866-5796 **Mailing Address:** P.O. Box 2863, Big Bear Lake, CA 92315

PURPOSE OF REQUEST FOR PROPOSALS

The Big Bear Municipal Water District (District or BBMWD) is seeking proposals from qualified consultants to develop a comprehensive strategic plan for the District. The District is looking for a consultant who can guide the Board of Directors and staff through a complete strategic planning process and prepare a professional, practical document that establishes the District's direction and priorities for the future. The final strategic plan should serve as a long-term guide for Board decisions, District operations, resource allocation, and future planning. The District is seeking a complete written strategic plan, not simply a workshop or meeting facilitation service.

PROJECT OBJECTIVES

The purpose of this project is to develop a strategic plan that:

- Establishes the District's mission, vision, and core values.
- Identifies the District's major challenges, opportunities, and long-term priorities.

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- Establishes clear goals and measurable objectives.
- Provides direction for future Board decisions, operations, and resource allocation.
- Identifies a process for monitoring progress and updating the plan over time.
- Reflects input from the Board of Directors, General Manager, staff, and other stakeholders as appropriate.

The plan should address the District's unique responsibilities, including lake management, recreation, facilities and infrastructure, financial sustainability, customer and community relations, staffing, and organizational effectiveness, as appropriate based on the planning process.

SCOPE OF SERVICES

The selected consultant will be responsible for managing the strategic planning process from start to finish. Proposals should describe the consultant's recommended approach, including the activities, meetings, workshops, and time needed to complete the project.

Background Research and Review

- Meet with the General Manager to discuss the District's needs, expectations, and desired outcomes.
- Review relevant District documents, plans, policies, financial information, and other background materials.
- Identify key issues, challenges, opportunities, and trends that may affect the District's future.

Interviews and Information Gathering

- Conduct interviews with Board members, the General Manager, key staff, and other stakeholders as appropriate.
- Gather input to understand the District's current position, challenges, opportunities, and long-term needs.
- Summarize key findings and themes to inform the planning process.

Strategic Planning Process

- Recommend and facilitate the meetings, workshops, and other activities needed to develop a comprehensive strategic plan.
    - Guide the Board and staff through discussions about the District's current position, future direction, and priorities.
- Facilitate the development of the District's mission, vision, values, goals, and objectives.
- Present findings and proposed direction for review and discussion. The consultant shall recommend the planning process and level of participation

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needed to produce a complete, practical, and effective strategic plan.

Draft Strategic Plan

Prepare a complete draft strategic plan based on the research, interviews, and planning activities. The draft should include, at a minimum:

- Introduction and purpose of the plan.
- Overview of the District and its current operating environment.
- Mission, vision, and core values.
- Major priorities and strategic direction.
- Goals and supporting objectives.
- Key challenges, opportunities, and strategies.
- Implementation, monitoring, reporting, and accountability framework.
- A concise, one-page summary of the strategic plan.

The plan should be written in clear, accessible language and organized in a professional format suitable for public distribution.

Review and Final Plan

- Present the draft plan to the Board and staff for review.
- Gather feedback and incorporate revisions.
- Recommend and facilitate any additional discussions needed to finalize the plan.
- Prepare the final strategic plan for Board consideration and adoption.

The proposal shall identify the consultant's recommended review process and include all anticipated meetings, presentations, and revisions in the proposed fee.

Implementation and Ongoing Review

Recommend a practical approach for putting the strategic plan into action, including how the District can:

- Translate goals and objectives into staff work plans.
- Measure and report progress to the Board.
- Consider the plan during budgeting and major decisions.
- Review and update the plan over time.

The District is seeking a complete strategic plan with an implementation and monitoring framework. Ongoing implementation services beyond the approved scope are not required.

PROJECT DELIVERABLES

The selected consultant shall provide the following:

- A project schedule and planning process.
- A summary of background research and interview findings.

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- Facilitation of the proposed strategic planning workshops and meetings.
- A complete draft strategic plan.
- Presentation of the draft plan and revisions based on District feedback.
- A final strategic plan in searchable PDF and editable Microsoft Word format.
- A one-page summary of the final plan.
- Recommendations for implementation, progress reporting, and future updates.

All final deliverables shall become the property of the District.

PROJECT SCHEDULE

The consultant shall recommend a project schedule based on the proposed planning process, including the anticipated time needed for research, interviews, workshops, draft preparation, review, revisions, and delivery of the final plan. The proposal should identify major milestones, anticipated District staff and Board participation, and any information or decisions needed from the District to keep the project moving forward. The District will review and approve the final project schedule with the selected consultant before work begins.

PROPOSAL REQUIREMENTS

Proposals should be clear and concise and include the following information:

Consultant Qualifications:

- Company name, address, and primary contact information.
- Description of the consultant's experience with strategic planning. Experience working with public agencies, special districts, or similar organizations. Provide examples of similar strategic plans completed within the past five years, preferably for public agencies or special districts. Include client references and links or copies of completed plans when available.
- Qualifications and experience of the individuals who will perform the work.

Proposed Approach:

- Description of the proposed planning process.
- Number and type of interviews, workshops, and meetings.

Consultants should propose the approach they believe will best meet the District's needs and produce a comprehensive, useful strategic plan.

Proposed deliverables:

- Anticipated project schedule.
- Any additional recommendations that would improve the final plan.

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Cost Proposal:

- Provide a total Not to Exceed proposed fee for completing the project based on the consultant's recommended approach. Include a breakdown of costs by major task and identify any additional expenses, exclusions, or optional services.
- The proposed fee should include all activities, meetings, workshops, presentations, document preparation, and revisions necessary to complete the proposed scope of work. Any services or expenses not included in the base fee must be clearly identified.
- The District will evaluate proposals based on the overall quality, completeness, and value of the proposed services, not simply the number of meetings or workshops offered.

PROPOSAL EVALUATION

The District intends to evaluate proposals based on the following criteria:

- Relevant experience and qualifications: 25%
- Understanding of the District's needs and proposed approach: 30%
- Quality of similar work and client references: 15%
- Project schedule and ability to complete the work: 10%
- Total cost and value to the District: 20%

The District may request interviews, presentations, or additional information from selected consultants before making a final selection. The District reserves the right to reject any or all proposals, request clarification, negotiate the scope and fee, or cancel this RFP if it determines that doing so is in the District's best interest.

PROPOSAL SUBMISSION

Proposals must be submitted electronically in PDF format to:

Elsa Donoho

Office Manager / Board Secretary

Big Bear Municipal Water District

edonoho@bbmwd.net

Subject Line: BBMWD Strategic Plan RFP – [Consultant Name]

Proposals must be received no later than December 13, 2026 at 3 PM. Late proposals may not be considered. Questions regarding this RFP must be submitted by email to the contact listed above no later than November 27, 2026 at 3 PM. Responses to questions may be shared with all interested proposers.

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GENERAL CONDITIONS

The District does not guarantee an award of a contract as a result of this RFP. The selected consultant will be expected to enter into a written Professional Services agreement with the District before beginning work. The consultant shall coordinate project activities with the General Manager and designated District staff. Any changes to the approved scope, schedule, or fee must be authorized by the District in writing. The consultant shall maintain confidentiality of information as required by applicable law and the District's agreement. The District reserves the right to negotiate with the selected consultant regarding the final scope of work, schedule, and fee.

DESIRED OUTCOME

The District's goal is to receive a complete, well-organized strategic plan that reflects the Board's direction, incorporates meaningful input from staff, and provides a clear path forward for the District. The final document should be practical, easy to understand, and useful as an ongoing guide for decision-making, budgeting, prioritizing projects, and measuring progress over time.