COUNTY OF SANTA BARBARA
PLANNING AND DEVELOPMENT DEPARTMENT

REQUEST FOR PROPOSALS

ON-CALL PROFESSIONAL PLANNING SERVICES

July 26, 2019

Deadline for Submission:
August 30, 2019
5:00 p.m.

Late Proposals Will Not Be Accepted

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County of Santa Barbara

Request for Proposals for Professional On-Call Planning Services

1. OVERVIEW OF PROJECT

The County of Santa Barbara (County), Planning & Development Department (Department), seeks to engage the services of multiple professional consultants to provide on-call professional services in the areas of environmental review, current planning, and long range planning.

The County has historically used consultants on an as-needed basis for projects and programs. Consultants have been utilized to prepare environmental documents in accordance with the California Environmental Quality Act (e.g., environmental impact reports, mitigated negative declarations, initial studies, and addenda to adopted/certified environmental documents). Consultants have also assisted in the review of development applications and the preparation of policy documents, including special studies, zoning code amendments, general plan elements, and other tasks as necessary. When needed, the County has retained consultants to conduct public outreach, organize community meetings, and participate in internal or public review processes.

The County invites experienced environmental and planning consultants to submit proposals. The ideal Consultants should be able to provide a range of experienced staff on an as-needed basis with limited notice. The County acknowledges that a consultant may not provide the full range of services sought (e.g., permit processing and environmental documents). If a consultant is proposing to assist with a discreet set of services this should be clearly delineated in their proposal.

2. SCOPE OF PROJECT

The awarded Consultants shall assist the County with preparing environmental documents pursuant to the California Environmental Quality Act (CEQA), processing of current planning projects, and long range planning programs. Services may include:

- Environmental services such as, but not limited to, the preparation of all types of environmental documents and other assignments (e.g., technical studies) as needed in accordance with CEQA.
- Current Planning services such as, but not limited to, processing of development applications, meeting with applicants, and attendance at hearings, for a variety of project types (e.g., cannabis, residential, commercial, and energy projects).
- Long range planning services such as, but not limited to, policy development, ordinance amendments, general plan element updates, community engagement
tasks, and attendance at hearings. For example, the Long Range Planning Division is seeking a consultant to assist with the development of ordinance amendments to allow farmstays on lands designated for agriculture. This project could take up to approximately two years (after accounting for the estimated time for Coastal Commission certification of the amendments) and would involve tasks such as drafting the ordinance amendments, preparing the environmental document for the ordinance amendments, and presenting the ordinance amendments to decision-makers for consideration at public hearings.

The Department plans to select at least one Consultant to provide each of the three types of services outlined above. The Awarded Consultants shall be expected to follow procedures as required by the County, County Codes, and State law, as applicable, for the development and preparation of environmental and planning documents. The on-call list may be utilized by several divisions (i.e., Long Range Planning, Development Review, and Energy and Compliance) within the Department.

The Consultant may specialize in a type of service or a range of services as described in this Section. Consultants shall clearly label responses to indicate which areas of expertise they are including in their proposal. The Department will use Awarded Consultants from the on-call list in ways best suited to each individual project. In some instances, the Department may select an Awarded Consultant directly from the on-call list and in other instances the Department may request proposals from multiple Awarded Consultants prior to awarding a project or task.

3. TASK DATE/TIME

- Deadline for submitting questions: August 9, 2019, by 5:00 p.m.
- Answers to all questions submitted available: August 21, 2019, by 5:00 p.m.
- Deadline for submission of proposals: August 30, 2019, by 5:00 pm.
- Evaluation period: August 30 – September 13, 2019
- Selection of Consultant(s): September 2019

NOTE: These dates represent a tentative schedule of events. The County reserves the right to modify these dates at any time, with appropriate notice to prospective Consultants.

4. SUBMITTAL INSTRUCTIONS

Questions regarding this RFP should be directed in writing via email to Trodrigu@co.santa-barbara.ca.us by 5:00 p.m. (PST) on August 9, 2019. Responses to the questions will be emailed to interested consulting firms by August 21, 2019.

The proposal must be signed by an official authorized to commit the firm, along with a statement that the contents remain effective for a period of not less than 60 days from the proposal due date.

a. Submit an electronic version of the proposal on a flash drive no later than the date and time listed above under Section 3 – Task Date/Tim of this RFP. Please hand-deliver or mail the flash drive to:
The County will not be responsible for or bound by (1) any oral communication or (2) any other information or contact that occurs outside the official communication process specified herein, unless confirmed in writing by the County Contact.

5. PROPOSAL REQUIREMENTS AND CONTENTS

Proposals should contain sufficient detail to allow for thorough evaluation and comparison. They should be as brief and concise as possible without compromising clarity. Proposals should include the following information, in sectionalized format:

A. Format and Content

- **Introduction** – Overall understanding of the project and approach; include any issues that you believe will require special consideration for this project. If a joint venture, please identify the prime contractor and all subcontractors.

- **Qualifications** – Firm capabilities, brief history, organizational structure, and top management (similar information for each joint venture participant and subcontractors, and approximate percentage of contribution), and relevant experience. Include the company(s) type and tax identification or social security number.

- **Staff** – Identification of the proposed project manager and relevant background; an organizational chart showing project manager, key staff, and all supporting staff to be assigned; brief resumes highlighting relevant qualifications; staff responsibilities, estimated hours, and percentage of total hours. Staff who are identified to perform the work for the project must actually perform the work. The selected consultant must obtain the approval of the County prior to making any staffing changes during the contract performance period.

- **Study Methodology** – Approach toward accomplishing work program; definition of each task, including depth of analysis, methodology, and data to be used. Specify where and how existing and original data would be gathered. Identify any recommended changes to the scope of work outline and basis for suggestions. A list of assumptions should be included that clearly define the limits of the scope of work.

- **Cost Proposal** – Itemized budget breakdown by task, deliverable, and cost proposal with estimated hours (total hours and project manager hours) and salary; administrative and overhead expenses; and indirect expenditures. The cost proposal should be presented separately from the technical proposal.

- **References** – List of former clients receiving comparable services to what is requested in this RFP, including the project manager's name and telephone number.
• Insurance – Summary of the firms (and sub-consultant’s) insurance coverage. Minimum coverage and types of insurance that are required to be maintained throughout the term of the project are identified in Attachment B (Standard Indemnification and Insurance Provisions).

B. Contract – Acknowledgement of terms and conditions and the ability to conform to these terms, as addressed in the County’s standard contract that has been included as Attachment A (Standard terms and conditions for independent contractors working for the County).

6. SELECTION PROCESS

A. County staff will evaluate all proposals and may conduct interviews as part of the review process. The selected proposal will be forwarded to the Director of the Planning and Development Department for final award of the contract. The following criteria will be used to rate firms and their proposals:

• Responsiveness to this RFP.
• Quality and clarity of proposal.
• Demonstrated competence.
• Ability to deliver requested services in an innovative and effective manner.
• Ability to develop a work product and materials that are accessible, understandable, and engaging for the County’s diverse stakeholders.
• Experience and quality in performance of comparable assignments.
• Cost effectiveness.
• Qualifications of project manager and technical staff.
• The firm’s flexibility and willingness to work closely with County staff.

B. Additional Information

• The County of Santa Barbara reserves the right to modify or cancel this RFP, in part or in its entirety, and to reject all proposals. The County reserves the right to negotiate with the selected consultant to make any necessary changes to the scope of work.
• All responses to this RFP will become the property of the County of Santa Barbara. All data, documents, and other products used or developed during the study will remain in the County domain upon completion of the project.
• The County of Santa Barbara’s Standard Provisions for Purchase Orders and Standard Anti-Discrimination Clause will be specified in the contract.
• The selected consultant must provide workers compensation insurance for all of its employees. The consultant must submit a certificate of insurance with the proposal to establish coverage, if such certificate is not already on file with the Planning and Development Department. See Attachment B (Standard Indemnification and Insurance Provisions) for the County’s minimum insurance requirements.
• The selected consultant must provide not less than $1,000,000 insurance for bodily injury and property damage claims as protection for consultant and County officers, agents, and employees. The consultant must submit a certificate of
insurance with a copy of the endorsement, with the proposal to establish coverage, if such certificate is not already on file with the Planning and Development Department. See Attachment B (Standard Indemnification and Insurance Provisions) for the County’s minimum insurance requirements.

7. ATTACHMENTS
   A. Standard Indemnification and Insurance Provisions
   B. Standard terms and conditions for independent contractors working for the County