



COUNTY OF SONOMA

Request for Proposals for Consultant Services to Prepare SPECIFIC PLAN & PROGRAM EIR for the Sonoma Developmental Center Site

The County of Sonoma is soliciting proposals from a team of consultants to assist County staff in preparing and adopting a Specific Plan and associated Program Environmental Impact Report for the redevelopment of the Sonoma Developmental Center site. The project is expected to incorporate significant community engagement and be completed within two years.

Proposers must submit one (1) electronic copy to the supplier portal at:
<https://esupplier.sonomacounty.ca.gov/psp/FNPRD/SUPPLIER/ERP/h/?tab=DEFAULT>

Note: Proposers must be registered to submit electronic submittals. See registration instructions on the Supplier Portal link above.

In addition to the electronic copy, proposers must submit one (1) signed original and six (6) copies of the signed proposal no later than
2:00 p.m. on July 12, 2019.

Proposals must be enclosed in a sealed envelope or package and clearly marked "SDC SPECIFIC PLAN."

Proposals shall be submitted to:

Sonoma County Permit Sonoma Department
2550 Ventura Avenue
Santa Rosa, CA 95403
Attn: Milan Nevajda

A. INTRODUCTION/PURPOSE

The County is seeking proposals from qualified firms to prepare a Specific Plan and associated Program Environmental Impact Report consistent with the California Environmental Quality Act (CEQA) to coordinate and facilitate the transition of the Sonoma Developmental Center site. The project is on an accelerated timeline, and proposals must demonstrate capacity to complete the Specific Plan and Program EIR within a 24 month schedule ending December, 2021.

Project Background and Setting

The County of Sonoma is embarking on a major planning effort involving the development of a Specific Plan to facilitate the transformation of the Sonoma Developmental Center (SDC) property in Sonoma Valley. The Sonoma Developmental Center was one of the oldest state-run developmental centers in California and has served individuals with developmental disabilities since 1891. At one time, SDC was the largest employer in Sonoma County, employing approximately 1,300 nursing, professional and administrative staff.

History of the SDC Transition

In May 2015, the State of California announced its plan to close all Developmental Centers. The plan included the closure of the SDC by the end of 2018, including finding community homes for over 300 residents. Patient care terminated at the end of 2018, and the State initiated the formal transfer of the site from the Department of Developmental Services (DDS) to the California Department of General Services (DGS). With the transfer to DGS, the site entered into a “warm shut down” mode to transition the workspace, surplus personal property, and move equipment and patient files. Typically DGS would then oversee the State’s process to transfer ownership of the property.

DGS can sell the land in the following order, according to statute: other State agencies, local agencies, followed by nonprofit affordable housing developers, then private entities or individuals at fair market value. Local zoning rules apply to the site unless the property is transferred to another State department, or leased by the State to a private entity.

Typically the process begins with DGS notifying other State departments of the excess property; upon receiving notice other departments have 60 days to express preliminary interest. DGS also works with its Real Estate Services Division to proactively identify any departments with current or future needs for land or facilities in the area of the excess property. With approval of the Department of Finance, the excess property is transferred to the selected State department, if applicable. If a State department does not request to take over interest in the property, the site is added to DGS’s annual list of surplus properties, which is submitted to the Legislature for approval. To date, no State agencies have indicated an interest in taking over the property.

The State and Sonoma County have been working towards an alternative approach to the surplus process for this unique facility given its significance and the degree of community interest. During the closure process, the State hired a professional planning consulting team to prepare a site assessment and outline a disposition process. A coalition of interested stakeholders was formed that have been actively engaged in the planning process and continue to meet regularly to identify goals for the transition of the site, and to assess the potential impact on the local community, and share community concerns.

Following years of planning and coordination, on April 5, 2019, the Sonoma County Board of Supervisors voted to authorize preparation of a Specific Plan for the SDC contingent on financial support from the State. On April 19, 2019 the Department of Finance submitted a proposed trailer bill amendment to the budget for funding that includes decommissioning and warm shutdown costs, as well as costs associated with a Sonoma County-led Specific Plan effort.

The Site and Context

The SDC site is located in central Sonoma Valley adjacent to Jack London State Park and the Sonoma Valley Regional Park in the community of Glen Ellen. The SDC project area is bisected by Arnold Drive, which is a major arterial that serves as an alternate route to Highway 12 in Sonoma Valley.

The SDC property is 945 acres and includes 140 buildings within a 200-acre core campus area. The buildings total over 1.3 million square feet of office, congregate care, and private residential space, constructed between the 1800s and 1990s. Most of the buildings and infrastructure are beyond their useful life and are vulnerable to failure, but some opportunities may exist to reuse existing buildings, and some structures carry architectural or cultural significance.¹ The property has important biological and natural resources within 745 acres of open space adjacent to Jack London State Historic Park and Sonoma Valley Regional Park. The site is designated in the Sonoma County General Plan as an important wildlife migration corridor connecting open space areas between Sonoma Mountain (west) to the Mayacamas Mountains (east). The property also holds water rights and covers a watershed that feeds a groundwater basin designated as “Medium Priority” by the local Groundwater Sustainability Agency. A Sustainable Groundwater Management Plan is currently in development for the basin.

The 745 acres of open space is designated as a voter-approved Community Separator in the Open Space Element of the Sonoma County General Plan. The Community Separator ballot initiative prohibits any changes in land use that increase intensity or density without a vote of the people. The entire site is currently designated Public/Quasi Public in the County’s General Plan, recognizing its historical use. The primary Planning Area Policy in the General Plan Land Use Element for the site states:

¹ See WRT report (2018).

“Policy LU-20ff: Consider future public uses of the Sonoma Developmental Center and Skaggs Island properties as a priority if they are declared surplus and offered for sale to local agencies, particularly park, recreation, and open space uses and affordable housing.”

Specific Plan

A Specific Plan is needed to represent the community’s vision and facilitate the site’s redevelopment. The overall goal of the Specific Plan effort is to guide future development to achieve an attractive and sustainable vision, which includes viable mixed uses and economic development, affordable housing opportunities, open space and resource conservation, cultural and historical preservation. The development articulated through the Specific Plan must be compatible in scale with the surrounding community, and consistent with State, County, and community goals.

The Sonoma Developmental Center property presents unique opportunities for both conservation and economic development. The potential exists for a mix of housing, limited retail or commercial, professional, educational, arts, public, and museum spaces benefitting the entire County of Sonoma. Protecting the open space lands that serve as critical habitat, riparian corridors, groundwater recharge, and the watershed has long been recognized as vital to not just the community of Sonoma Valley but to the entire county. Multiple studies and community engagement processes have affirmed these benefits including the recent State-commissioned Wallace Roberts & Todd (WRT) report, the Sonoma County Water Agency’s, “Review of Water Resources for Sonoma Developmental Center”, and the Potrero Group’s 2015 study. As noted in these reports, SDC has been the County’s largest employer, providing decades of essential patient care services to the developmentally disabled. SDC has historically contributed to the economic strength of the county and helped frame social values of caring for the most vulnerable within our community.

Specific Plan. The County is seeking proposals from qualified firms to prepare a Specific Plan and help coordinate and facilitate the ultimate transition of the SDC. The project is on an accelerated timeline, and proposals must demonstrate capacity to complete the Specific Plan and associated Program EIR within a 24 month schedule. The overarching project tasks must, at minimum, include:

Meaningful and comprehensive community engagement throughout the process

1. Project Understanding

- Extensive community engagement
- Constraints and Opportunity Analysis, ***building on existing studies***
 - Including a detailed water supply analysis
- Economic Demand and Feasibility of Reuse Options

2. Land Use Alternatives Development

- Examination of alternative models for site redevelopment

- Land Use, Open Space and Zoning Plan
- Preliminary Design Guidelines for each alternative
- Selection of a Preferred Alternative (or blend)

3. Plan Development

- Detailed Specific Plan document with land use, open space, and zoning
- Finalized development standards and design guidelines
- Infrastructure Needs Assessment and Cost Estimates
- Financing Plan

4. Program Environmental Impact Report and Mitigation Monitoring Program

Previous Planning

The State prepared a preliminary existing conditions assessment of the site, the buildings, and utilities through the WRT report provided below. The selected consultant team will peer review the findings in the report and build upon the work completed to date to provide a more detailed and fine-grained assessment of the site.

Through the WRT report, the State hosted several public workshops to inform the community about the process and to gather input on potential issues and redevelopment goals for the site. Through that process local stakeholders formed the **SDC Coalition**, a group that has been involved in planning efforts for several years and recently prepared a conceptual report entitled “Transform SDC” as a guiding document. The Coalition has also hosted several workshops, e.g. the Glen Ellen Historic Society and Glen Ellen Forum Workshops, to gather insights from similar experiences in other communities and to identify goals and objectives for the site.

Relevant Documents

The following documents provide both general and site-specific information that should be reviewed when preparing proposals:

- Wallace Roberts & Todd (WRT), **Sonoma Developmental Center: Existing Conditions Assessment**, August 2018, <https://www.dgs.ca.gov/RESD/Resources/Page-Content/Real-Estate-Services-Division-Resources-List-Folder/Sonoma-Developmental-Center-Existing-Conditions-Assessment>
- JRP Historical Consulting, **Historic Resources Inventory and Evaluation Report, Sonoma Developmental Center**, February 2018
- Prunuske Chatham, Inc., **Sonoma Developmental Center Draft Resource Assessment**, April 2015, <https://sonomalandtrust.org/enews/2015/1505/Draft-SDC-Report-with-all-Exhibits.pdf>
- The Portrero Group, **Sonoma Developmental Center: Site Transformation Study**, September 2015, <https://transformsdc.files.wordpress.com/2015/09/potrero-group-final-report-sdc-site-transformation-study-9-30-15.pdf>

- Transform SDC <https://transformsdc.com/>
- **Glen Ellen Forum SDC/Eldridge Public Workshop**, April 16, 2018, http://glenellen.org/wp-content/uploads/2018/05/FINAL-SUMMARY_SDC-4-16-18-Workshop_Community-Input.pdf
- D. Painter, & J. Gracyk, **Sonoma Developmental Center Survey, Eldridge, Sonoma County, CA**, 2008; rev 2014; rev 2015. <https://www.worldcat.org/title/sonoma-developmental-center-survey-eldridge-sonoma-county-california/oclc/933785713>
- Sonoma County, **General Plan 2020** <http://sonomacounty.ca.gov/PRMD/Long-Range-Plans/General-Plan/>
- Sonoma County, **General Plan Environmental Impact Report** http://www.sonoma-county.org/prmd/docs/eir/gp2020deir/full_deir.pdf
- Sonoma County, **Bicycle and Pedestrian Plan**, 2010, <http://www.sonoma-county.org/prmd/docs/misc/bikeplandraft.pdf>
- Sonoma County Economic Development Board, **Sonoma Valley: Community Profile**, 2011, http://www.sonomavalleyfund.org/reports/sv_community_profile.pdf
- Sonoma County, **Community Separators Ballot Measure** <https://sonomacounty.ca.gov/PRMD/Regulations/Community-Separators/>
- **Sonoma Valley Groundwater Sustainability Agency** <http://sonomavalleygroundwater.org/history/>
- **Sonoma Valley Groundwater Management Plan**, 2007 <http://sonomavalleygroundwater.org/wp-content/uploads/Sonoma-Valley-Groundwater-Management-Plan-2007.pdf>
- Caltrans, **Transportation Concept Report, State Route 12 (West)**, 2014 <http://www.dot.ca.gov/d10/tcr-csmp/sr12/SR12.pdf>
- OPR, **Planner's Guide to Specific Plans**, 2001, opr.ca.gov/docs/specific_plans.pdf
- Glen Ellen, **Development and Design Guidelines**, 2014 <http://sonomacounty.ca.gov/PRMD/Planning/Planning-Document-Library/>
- Sonoma County Dept. of Transportation and Public Works, **Guidelines for Traffic Impact Studies**, May 2016, sonomacounty.ca.gov/TPW/Roads/Services/Data-and-Resources/Traffic-Study-Guidelines/
- Sonoma County Permit Sonoma Department, **Visual Assessment Guidelines**, January 2019, <http://sonomacounty.ca.gov/PRMD/Regulations/Environmental-Review-Guidelines/Visual-Assessment-Guidelines/>
- Sonoma County Permit Sonoma Department, **Guidelines for the Preparation of Noise Analysis**, November 2018 <http://sonomacounty.ca.gov/PRMD/Regulations/Environmental-Review-Guidelines/>

Project Site Objectives

In May, 2018 the Sonoma County Board of Supervisors directed staff to consider several County interests as guiding principles in discussions with State agencies on the SDC site. Major focus areas included retaining local control and authority of land use planning, robust public participation and community engagement, watershed and natural resources protection, and no County liability for SDC conditions. The full Board report and discussion are available at: http://sonoma-county.granicus.com/GeneratedAgendaViewer.php?view_id=2&clip_id=784.

In addition, the Transform SDC community visioning process in 2015 identified guiding principles (website listed above) and the Glen Ellen Forum (the local community non-profit organization, website listed above) developed goals for the site that are consistent with the above objectives.

Specific Plan Requirements

The Specific Plan process is anticipated to begin in September 2019 and must be completed by September 2021. The expectation for the Specific Plan and associated Program EIR are outlined below. The project will require a multidisciplinary consultant team with expertise and experience in the following areas:

- Successful community planning and consensus building
- Land use planning and neighborhood design
- Redevelopment and reuse
- Mixed use projects and affordable housing
- Infrastructure assessment
- Multimodal transportation planning, including bicycle and pedestrian connectivity, safety and accessibility
- Traffic calming, parking analysis and management strategies
- Economic feasibility and market demand analysis
- Graphic design, illustration, mapping, and development visualization
- Open space and natural resources preservation and recreation planning
- Environmental review under CEQA and EIR preparation
- Healthy Communities planning strategies
- Historic and Cultural Resource Preservation
- Familiarity with Sonoma Valley and issues associated with redevelopment in semi-rural communities

The County will retain the right to select sub-consultants from various teams as deemed appropriate. The Specific Plan will serve as the County's long range, comprehensive land use, circulation, and implementation plan for guiding development within the plan area boundary and must be consistent with California Government Code §65450-65457.

Desired Goal/Objectives/Outcomes

It is essential that the specific plan be visually rich, with a user-friendly format, and clear, concise text. The plan must be cost-efficient, but should rely on state-of-the-art graphics (including photo-simulations) and maps to illustrate planning concepts, conceptualize plan build out, present the plan vision in a compelling way, and make information understandable to the public, and prospective investors in the SDC property.

The SDC Specific Plan is intended to enable development and investment in the property that reflects the conditions of the site and the vision of the community. The Plan and its associated environmental review must provide clear direction for prospective buyers and investors in the property. Therefore the Plan must be realistic and actionable. Preparation of the Specific Plan will coincide with the State's property disposition process; the final Plan must be adopted—and its EIR certified—before the State can issue a request for proposals for site development. Proposals must show a capacity to meet the two-year completion timeframe for the Specific Plan because of the parallel State process for site disposition. The primary objectives to be accomplished through this planning process include:

- Inform, engage, and solicit input from all segments of the community in the process.
- Prepare a market demand analysis that will guide the selection of the land use alternatives toward a realistic development scenario.
- Identify the infrastructure and public service needs, and associated costs, to facilitate future development under the Specific Plan.
- Explore alternatives for reuse of existing facilities and buildings.
- Establish a land use and policy framework to guide future redevelopment of the area that is compatible and in character with the surrounding community.
- Ensure that the plan is designed to promote a healthy neighborhood and enhance opportunities for alternative modes of transportation.
- Develop design guidelines that promote an attractive and vibrant, pedestrian and bicycle friendly community.
- Develop a plan to connect to and preserve open space and natural resource areas, including wildlife corridors within the campus area. It is the intent of the State Legislature and the County that the lands outside the core developed campus and its related infrastructure be preserved as open space. Limited planning in open space areas will be needed, however the interaction between developed portions of the site and open space and recreation areas must be defined.
- Prepare an Implementation and Financing Plan to facilitate improvements in accordance with the Specific Plan.
- Prepare a Program Environmental Impact Report in compliance with CEQA, which will facilitate future development in accordance with the Specific Plan. The planning document and CEQA analysis will be integrated to create a self-mitigating plan.

Site Issues and Challenges

The SDC site presents several unique issues and planning challenges that must be considered in developing the Specific Plan:

1. The site is within the established semirural community of Glen Ellen and partially surrounded by open space lands that are actively used by the public for walking, hiking, bicycling and horseback riding. Also, there are recreational facilities within the campus area and an established ropes course in the open space area. The site has been accessible to the public for decades and has been heavily used by the community for recreational activities.
2. The site is accessed by one main road, Arnold Drive, which also provides access to Glen Ellen and is a major commuter arterial between Glen Ellen/Santa Rosa and Sonoma. Arnold Drive is used as an alternate route to Highway 12.
3. The community has a strong interest in the land use planning for the site due to its location and the fact that any redevelopment on the site will have effects on the surrounding Glen Ellen village. Any future plan will emerge from community input and support. Design guidelines must respect local context: existing design guidelines for Glen Ellen, as well as Sonoma Mountain, shall be consulted and considered in the design of the site. Design guidelines for SDC will need to factor in these other guidelines to ensure consistency. (See Glen Ellen Forum SDC Workshop Summary of Public Comments)
4. The existing SDC central plant and infrastructure is aging, yet there may be opportunities for adaptive reuse of some of the facilities and buildings that will need to be explored.
5. The campus portion of the site has an existing street and sidewalk network and is well-planned in terms of open spaces and landscaping that provide aesthetic amenities and opportunities for wildlife movement in this narrow migration corridor.
6. Public safety (e.g. fire) is an important concern because of the amount of forested lands on the site and the fact that SDC had its own police and fire safety department protecting the property. Long term fire protection services will need to be identified in the Specific Plan.
7. The presence of SDC has been an integral part of the Glen Ellen community and the site maintains historical significance for Sonoma Valley as a whole.
8. There are several historic structures that are eligible for the National and State Historic Registries, an existing cemetery, and the site may have other significant cultural resources. A Historic Resource Inventory and Evaluation Report was prepared by JRP Historical (February, 2018) on the site, however the Period of Significant (POS) remains inconclusive. The POS will define the number of contributing buildings and portions of site (including open space areas) of historical importance. The historical significance of the site's structures and grounds—including the demolition thereof—must be fully analyzed and considered in the Specific Plan environmental document. An archaeological assessment, sensitivity analysis, and National Register significance criterion D assessment have not been completed for the site. Local significance has not been evaluated.
9. There are competing private interests that have been promoting specific redevelopment proposals.

- 10.** The campus itself is in the pinch point of the wildlife corridor and design features are needed to maintain and, if possible, enhance this heavily used animal corridor. The campus, as it exists now, provides a substantial amount of open space that allows wildlife movement. It is the intent of the State Legislature and the County that the lands outside the core developed campus and its related infrastructure be preserved as open space. Limited planning in open space areas will be needed, however the interaction between developed portions of the site and open space and recreation areas must be defined.
- 11.** A limited-scope Phase I Environmental Site Assessment was prepared for the property and is summarized in the appendices to *Sonoma Developmental Center Existing Conditions Assessment* prepared by WRT (August, 2018). The analysis found hazardous materials and contamination in historic buildings and historic areas throughout the site that must be considered in redevelopment feasibility and marketability analyses.

B. STATEMENT OF REQUIREMENTS – SCOPE OF WORK

The following section summarizes the major tasks expected for the preparation of the Specific Plan and associated EIR (note: specific instructions for preparing proposals are provided in Section J).

Note: Deliverables prepared through the scope of work for the Specific Plan and EIR must meet the following requirements:

- Final reports and Specific Plan documents: Six (6) hard copies will be provided as well as an electronic copy to Permit Sonoma. The reports and Specific Plan documents will include all maps and graphics in both original Microsoft Word and an accessible format per requirements listed in Attachment F.
- Text pages shall be 8½" x 11" format. Figures may be formatted to 11" x 17".
- Appendices shall be individually paginated.
- All digital deliverables shall be Americans with Disabilities Act (ADA) compliant (see Attachment F "Digital Deliverables"). Memoranda (memos) to staff are not subject to these requirements.

The SDC grounds will be accessible to the consultants throughout the planning project, however site visits with access to structures will need to be coordinated with staff in advance.

Orientation and Project Kickoff

The selected consultant will facilitate a project kickoff meeting with County staff. In advance of the meeting, the consultant team shall further refine the scope of work and schedule included in the proposal to negotiate a final, detailed scope of work and project schedule. The kickoff meeting will cover: project objectives, data needs determination, refined project area boundaries, background information collection, identification of project issues and challenges, networking with essential project partners, initial discussion of the community engagement strategy, and project management. Following approval of the final Scope of Work and Notice to Proceed, the consultant team will be expected to participate in bi-weekly checking (at minimum) with the staff project manager at Permit Sonoma in addition to meetings, events, and other engagements consistent with the work plan and community engagement strategy.

Deliverable(s):

- *Orientation Meeting*
- *Final Scope of Work*
- *Final Project Schedule*
- *Data needs memo to staff*
- *Meeting Summary*

Community Engagement Strategy

The successful proposal must include a preliminary but robust Community Engagement Strategy that demonstrates consistent, meaningful, engaging, and effective community consultation throughout the Specific Plan process. The Glen Ellen community has been actively engaged since the closure of the developmental center was first announced. Community engagement must include referral to affected agencies, schools, tribes and other organizations that may have an interest or provide services to the project.

The Community Engagement Strategy shall meet the following objectives:

- 1. Effective.** Be cohesive and well managed to ensure that the community is kept fully aware of the process, upcoming activities, and available resources.
- 2. Consistent.** Provide consistent opportunities for engagement with the community throughout the planning process.
- 3. Accommodating.** Incorporate a variety of formats and techniques to ensure that community members with varying communication comfort levels, availability, and needs are able to participate.
- 4. Engaging.** Be engaging, fun, and dynamic.
- 5. Multi-faceted.** Use both traditional, in-person, and online communication methods.
- 6. Inclusive and Respectful.** Provide translation services at events involving major milestones, and organize engagement to include youth, adults, and elderly residents. Ensure that all engagement activities/events are managed so that organizers and participants are respectful of all points of view.
- 7. Meaningful.** Result in productive and actionable outcomes that are incorporated into the Specific Plan and Program EIR.

County staff will form one or more Technical Advisory Committees (TAC) consisting of County staff, representatives of the State, members of other responsible agencies, and subject-matter experts. The County will also form a Community Advisory Committee (CAC) to serve as an ambassador to the community and provide an additional forum for public participation. The consultant will present information to the TAC as needed to gain technical insight prior to finalizing deliverables. The consultant shall incorporate the CAC into the Engagement Strategy and report out to the CAC on a bi-monthly basis at a minimum on project progress.

The consultant team will conduct a kick-off with the CAC and community, to present the preliminary Community Engagement Strategy, project scope of work, and project timeline. The consultant shall gather input on refining the Community Engagement Strategy at the kick-off. Based on feedback received, including staff input, the consultant shall prepare a final engagement strategy. To reach the largest possible audience for the community kick-off, the consultant is advised to consider a multi-day engagement program on-site, with an online presence. County Staff will supplement the kick-off with a direct-mail campaign with guidance from the consultant.

Deliverable(s):

- *Community “Kick-Off” to Engagement*
- *Refined Community Engagement Strategy*
- *Develop and green-light the project website*
- *Prepare branded template documents and materials for engagement activities.*

Planning Area Profile and Background Report

The scope of work shall not duplicate work that has already been completed to assess SDC conditions. Several studies have been prepared that are robust and accurately reflect conditions, however gaps remain. Staff is seeking consultant direction on where resources need to be focused to ensure that the Specific Plan effectively addresses site constraints and creates an actionable plan to promote future investment and development at the site. Topics that will likely require more careful analysis include:

- Costs, environmental review, and logistics associated with demolition during redevelopment.
- Infrastructure assessment and financing strategies to cover capital costs.
- Water resources and distribution.
- Cultural and historical resources, including how the presence of significant sites or structures may create environmental, financial, and logistical challenges during demolition and site redevelopment.

The consultant will conduct a peer review of the WRT Existing Conditions report and other relevant materials and supplement the analysis as needed. The consultant team will prepare a written background report that will include a profile of the community and existing conditions, opportunities and constraints analysis for the SDC site and surrounding area. This information will establish the parameters for alternatives analysis for the site, as well as the baseline for CEQA analysis.

The report will describe the existing setting, including: land use and demographics, biological resources, water resources (hydrology/geology), cultural resources (historic and archeological), scenic resources, circulation and infrastructure, noise, and air. The report may draw heavily from the information provided in the relevant documents noted below. The following topics shall be addressed:

- 1. Socio-Economic Profile.** Prepare an overview of demographic, social, and labor statistics for the site and surrounding market area.
- 2. Land Use.** Identify existing land use on the site and in the surrounding Glen Ellen community. Define the residential inventory by housing type and level of affordability. Assess existing land use constraints and opportunities.

3. **Architectural Resources.** Identify historic structures and places, unreinforced masonry buildings in the project area, reuse potential, and broadly define the architectural character of Sonoma Valley for a basis of future design guidelines.
4. **Regulatory Setting.** Define the existing regulatory framework for the site, including the County’s standards, state regulations, and Specific Plan requirements.
5. **Community Consultation.** Provide an overview of community consultation to date—including reports and statements prepared by community groups—and the preliminary goals, visions, constraints, and issues identified.
6. **Existing Mobility and Travel Patterns.** Identify existing travel patterns and conditions for all modes of transportation including automobiles, buses, bicycles and pedestrians. Establish constraints for each modes and inventory existing parking and accessibility issues. Define the site’s accessibility to transit, commercial areas, schools, services, employment, amenities, etc. The description of existing transportation infrastructure will include roadways (width, speed limit), sidewalks (width, block length, curb cuts), pedestrian road crossings (location, mid-block, treatment, visibility, curb return radii, refuge islands, audible signals, lighting), parking inventory, bicycle lanes (width, treatment, location, designation by class, intersection treatment), bus stops (location, shelters, frequency), and accessibility. Baseline traffic counts and modelled travel behavior shall be defined to establish the project setting.
7. **Public Services and Infrastructure (Sewer, Water, Power, Drainage, Fire Protection).** Provide location and design capacities of current infrastructure. Identify any issues or limitations of the sewer, water, storm water, and utility systems, and their ability to serve redevelopment uses and opportunities to improve infrastructure to support new land uses. Describe current fire protection system and the constraints and opportunities to enhance fire protection services.
8. **Open Space.** The report must identify the natural resources values and functions for the open space areas of the site and examine the constraints and opportunities for enhanced connectivity for biotic resources, water resources and recreational uses. Significant research and analysis has already been completed in this regard. For open space functions, it is expected that the Specific Plan will plan focus on the interaction and relationship between the developed portions of the site and open space areas, which will be preserved.
9. **Hazards.** Assess the site’s exposure to hazards, such as wildfire.

Deliverable(s):

- *Community profile background report/constraints and opportunities analysis*

Market Demand and Housing Feasibility Analysis

Prepare an analysis of development demand for residential, commercial, mixed use, institutional, and open space/recreational development in the plan area. An estimate of the amount of future commercial development that could be supported by expected growth in housing and population shall be provided, along with the associated increase in employment opportunities. The analysis will assess the constraints and opportunities for reuse of the existing buildings and infrastructure versus redevelopment of the site. The cost of demolition and removal must be considered in the market demand and feasibility analysis.

The State of California and Sonoma County are in a housing crisis. The SDC Specific Plan will seek to provide affordable housing for the area. The area's need and the future potential for housing of various types, densities, and levels of affordability, given existing transportation infrastructure, land use compatibility issues, and other environmental and planning constraints shall be evaluated. The market demand analysis will include a preliminary pro forma analysis for mixed-income housing to explore the economic challenges of below-market housing construction. The intent of this pro forma analysis is to better understand the density of market-rate housing or intensity of other development that may be necessary to offset affordable housing costs in the project area. Alternative or supplementary analyses/approaches recommended by the consultant team that will facilitate meaningful dialogue, build consensus support for, and successfully promote affordable housing in the Specific Plan are highly encouraged.

Deliverable(s):

- *Market Demand Analysis*

Architectural, Historic, and Cultural Resource Analysis

The consultant will review the Historic Resources Inventory included in the Existing Conditions Report prepared by WRT, including updates thereto, and evaluate the potential for adaptive reuse of historic structures that are eligible for listing on the State or National Registries. The Specific Plan must identify buildings to be retained, buildings to be modified, and buildings to be demolished—the Architectural, Historic, and Cultural Resource Analysis must provide sufficient information to determine how buildings and sites will be used and allow for an appropriate environmental review of the impacts to significant structures and sites. Structures that cannot be feasibly adapted will be identified – mitigation measures will need to be defined in the Specific Plan. The analysis should evaluate the potential for adaptive reuse and preservation alongside redevelopment potential. A cost/benefit analysis of the different approaches must be included.

Cultural Resource surveys may require tribal consultation.

Deliverable(s):

- *Historic and Cultural Resource Evaluation and Reuse Analysis Report*

Water Supply Assessment

A Water Supply Assessment will be needed for the Specific Plan in accordance with SB 610 (2001). The Specific Plan is expected to qualify as a “project” pursuant to California Water §10912 since it occupies more than 40 acres and is expected to generate a water demand equivalent to or in excess of 500 dwelling units. Currently the site has an independent water supply and treatment plant system originally built in the 1930s that is operated by the State. The system’s capacity is up to 1.8 million gallons per day. The property has both pre- and post-1914 appropriative water rights and riparian water rights. There is an estimated 840 acre-feet of combined raw water storage in two lakes that are fed from on-site springs and creeks.

The State has an agreement with the Sonoma County Water Agency to supply water to the facility through an intertie connection, though a repair to the connection is needed. Water was supplied under this agreement in the past when the water treatment plant was undergoing repairs. The State also has an agreement with the Valley of the Moon Water District to provide water to the District for emergency purposes via an intertie connection along Arnold Drive that relies on a portable pump.

The consultant will need to explore the feasibility and possible conversion of this system to a private utility, annexation to the Valley of the Moon Water District to serve new development, or other water supply alternatives. The consultant will need to review the Existing Conditions Report on Hydrology and Site Infrastructure, estimate projected demand under various alternatives, identify needed infrastructure improvements to support the proposed land uses, evaluate the site’s contribution to the groundwater resources in the larger planning area, and define the various options for conversion or transfer of the existing water supply system to another entity or municipal utility or other water supply alternatives.

Deliverable(s):

- *Water Supply Assessment and Alternatives Analysis Report*

Review and Publication of Background Reports

The consultant team will prepare the discreet components of the background conditions report and submit the analyses to staff and TAC (as necessary) review. State representatives will review the documents and provide feedback through representatives serving on the TAC. The background conditions will also be presented to the CAC before final compilation and publication. It is assumed that community input will be gathered throughout the background data gathering process. The County encourages consultants to consider online tools for distributing the background reports, which may include a hosted webinar or other “walkthrough” of the technical documents.

Deliverable(s):

- *Meeting Facilitation: Community, Technical Advisory Committee, Citizen Advisory Committee*
- *Meeting materials including notice, flyers, slides, handouts, web information, etc. (hard and digital copies)*
- *Large format display illustrating project alternatives with additional sketches, elevations, and street sections as needed to conceptualize each alternative*
- *Community outreach and materials (hard and digital copies)*

Project Alternatives and Analysis

The consultant team will develop at least three different land use conceptual plans for the project area. An analysis will assess the impact of each scenario on the project area and surrounding community, as well as the feasibility of instituting each alternative with respect to infrastructure capacity, services, market forces, etc. The alternatives should promote a healthy, active community and increase access to services and facilities throughout the planning area and to destination beyond the project boundary. Alternatives should avoid significant environmental impacts.

A multimodal transportation analysis will be required for each project alternative. A comparison of safety and connectivity to services, schools, transit, bicycle and pedestrian paths, and ultimately to employment centers will be included. The analysis will analyze both Levels of Service and Vehicle Miles Travelled for motor vehicles, transit, bicycle, pedestrian travel behavior as appropriate. Parking strategies for each project alternative will be compared.

A report, maps, diagrams and comparison charts describing and analyzing the alternatives will be prepared. The analyses will quantify development capacity in terms of housing (units, type, and affordability), non-residential floor area by type, population, as well as employment and likely income profiles. The projected population and jobs for each alternative shall be included. Maps, diagrams or descriptions shall be provided to adequately identify the distribution, location, extent, and size of the major infrastructure components needed to serve the site.

Deliverable(s):

- *Project Alternatives Report including an analysis of land use, circulation and infrastructure needs*

Presentation of Project Alternatives and Analysis

The consultant will present the project alternatives to the TAC and County staff for review, feedback and possible revisions. State representatives will review the document and provide feedback through representatives serving on the TAC. The revised project alternatives will then be presented to the CAC for review and comment. The consultant and County staff will plan and facilitate community engagement activities following the review by staff, TAC, and CAC to inform and solicit any public concerns, recommendations, and preferences.

Deliverable(s):

- *Meeting Facilitation: Community, Technical Advisory Committee, Citizen Advisory Committee*
- *Meeting materials including notice, flyers, slides, handouts, web information, etc. (hard and digital copies)*
- *Large format display illustrating project alternatives with additional sketches, elevations, and street sections as needed to conceptualize each alternative*
- *Community outreach and materials (hard and digital copies)*

Specific Plan Administrative Draft and Focused Studies

Based on input received from staff, TAC, CAC, the community, and resource and technical agencies, the consultant will work with County staff to identify the preferred project alternative that will serve as a basis for the Specific Plan. The Draft Plan shall be developed in coordination with the environmental impact analysis to ensure that impacts of the Plan are minimized through the proposed policies and implementation plan.

The consultant will prepare an administrative draft of the Specific Plan. Technical reports will be updated to specifically address the alternative selected and relevant findings of the reports will be summarized in the Specific Plan. These technical reports may include the Market Demand Analysis, Public Infrastructure and Services Cost Estimate and Financing Plan, Historic Resources Reuse Plan, Biotic Resource Assessment, Traffic Analysis, Noise Analysis, Visual Assessment, and Design Guidelines. Refer to the County's Guidelines for preparing technical reports for Traffic, Noise, and Visual Assessments.

The Specific Plan will include a Land Use Plan including the minimum and maximum allowed residential densities and building intensities. Population and job projections will be defined at build-out. Infrastructure and circulation improvements must also be identified. The Plan must include an Implementation Plan that includes estimated costs for public infrastructure and possible financing mechanisms, as well as strategies to incentivize affordable housing. The Plan must include Design Guidelines for the public and private realm. The Administrative Draft Specific Plan will be presented to County staff for review and comment.

The Specific Plan will be prepared in compliance with California Government Code §65450–65457 and include all of the following components:

1. Detailed Table of Contents, Index and Glossary. The specific plan must be designed for easy navigation. User-friendly formatting and cross-references are essential.
2. Introduction and Summary of Plan: Purpose statement and range of issues, location and acreage, project background, and summary of preparation process.
3. Relationship to the General Plan. A detailed statement of the relationship of the Specific Plan to the General Plan, including consistency of the Specific Plan with the General Plan. A discussion of how the Specific Plan furthers the goals, objectives, policies and programs of the General Plan shall be included. Staff anticipates that the Specific Plan will be adopted as an amendment to the General Plan concurrent with rezoning of the site to Planned Community. The General Plan will be in the process of being updated and the Specific Plan is envisioned as a building block for the General Plan Update. The Specific Plan may also be processed concurrently with a Preliminary Development Plan and Development Agreement depending upon the State's RFP and selected consultant process.
4. Relationship of the EIR to Subsequent Development. The Specific Plan must include a statement describing the application of the Environmental Impact Report to Subsequent Discretionary Projects and identify:
 - Projects that will be exempt from additional environmental review based on the plan's EIR.
 - Projects that will require additional environmental review.
5. Plan Vision and Goals. The Specific Plan will articulate a clear vision, and establish overarching goals that will guide topical objectives and related policies.
6. Land Use Plan and Zoning Maps. The land use plan will facilitate the Specific Plan vision and goals. It will include maps and descriptions of proposed land use designations, zoning, housing densities, building intensities, and site- or area-specific policies. Text and illustrations of key project elements such as public spaces and proposed public improvements will be provided along with illustrations of various locations within the plan area under a build-out scenario.
7. Photo-simulations. Photo-simulations will be used to illustrate the appearance of future redevelopment at key view points from Arnold Drive and surrounding lands.
8. Open Space and Resource Conservation Plan. The open space and resource conservation plan will address the allowed uses within the open space areas of the site and establish goals, objectives, policies and programs for protecting natural resources. Open space areas are expected to be preserved in perpetuity, however the interaction between built and open space areas shall be appropriately planned.

9. Circulation Plans and Maps. Recognize the existing circulation system of the site and address the entrances/gateway to the community and access ways to support the identified development. The Circulation Plan will propose circulation improvements that will enhance uses on the property, and ensure public safety, emergency access and multimodal connectivity within the plan area and into the surrounding community. The plan will provide for pedestrian and bicycle safety and incorporate complete street policies. Enhanced transit service and access for the disabled and aging populations should also be considered.
10. Design Guidelines/Standards. Develop Design Guidelines that promote an attractive, pedestrian-oriented development, compatible with surrounding land uses, and at a density and intensity in character with Sonoma Valley. Topics will likely include site planning, building massing, height, building design, parking areas, transition areas, signage, landscaping and open space.
11. Utilities and Services: Description of existing and proposed infrastructure to serve the area, including: storm drainage, water, wastewater, gas and electrical, telecommunications, as well as undergrounding new services.
12. Financing and Implementation Plan (Appendix).

The Infrastructure and Financing Plan will include a description of existing and planned public facilities (streets, roads, sidewalks, bike lanes and racks, utilities, street furniture, street trees, parking, water supply, storm water management, etc.) and the public services within the planning area (schools, public safety and emergency services). The plan will identify the improvements needed to support the planned development in the proposed Specific Plan and provide cost estimates and implementation strategies for phasing and financing. Required mitigation measures and their implementation costs must be included.

The Financing and Implementation Plan will identify action items for each section of the Specific Plan that are needed to implement the goals of that section, as well as for implementation of the overall plan. Each action item shall be assigned a time frame for implementation as well as responsible party/agency department to easily identify immediate next steps and longer term actions. Each item should have a cost estimate and potential funding sources.

Strategies for financing infrastructure and other public services and improvements (open space, streetscape enhancements, etc.) will be discussed. The implementation and financing plan will also include an analysis of the existing array of financial and regulatory incentives available to the County to encourage revitalization and attract economic development to the Specific Plan area.

Changes to regulations and policies required to implement the Plan will also be discussed and included in the Implementation Plan.

13. Administration: Description of any fees, amendment procedures, development review procedures, and County departments and agencies responsible for Specific Plan implementation and reporting.

Deliverables:

- *Administrative Draft Specific Plan*
- *Supporting Technical Reports/Studies*

Public Review Draft Specific Plan

Staff comments on the Administrative Draft Specific Plan will be incorporated into the public review Draft Specific Plan and posted and distributed for review and comment to the TAC, CAC, public, tribes, and agencies. The Consultant will present the Draft Specific Plan at a community meeting and Planning Commission workshop.

The Specific Plan must be visually rich, with a user-friendly format, and clear, concise text. The plan must rely heavily on state-of-the-art graphics and maps to illustrate planning concepts, conceptualize plan build out, present the plan vision in a compelling way, and make information understandable to the public. The document must be logically organized and easy to use. Graphics, illustrations, photographs, tables and maps must be well integrated into the plan at appropriate locations to explain the concepts presented.

Document formatting must facilitate readability by making use of distinctive heading styles to clearly distinguish sections, sub-sections, paragraphs, etc. Headers and footers must be used to highlight section numbers and topics on each page and allow the reader to easily locate information.

Deliverables:

- *Meeting facilitation and materials (digital & hard copies)*
- *Planning Commission workshop/hearing facilitation and materials (digital & hard copies)*
- *Public Review Draft Specific Plan*

Environmental Review Scoping

An Initial Study for CEQA is not necessary as Permit Sonoma has determined that a Program EIR is required. The consultant shall prepare a Notice of Preparation (NOP) in consultation with staff. After incorporating County review comments on the preliminary Project Description, the Consultant will prepare the NOP and will conduct a Public Scoping Meeting for the EIR.

Deliverables:

- *Notice of Preparation*
- *Scoping Meeting facilitation*
- *Meeting materials and handouts*
- *Summary Report of scoping comments*

Program EIR - Administrative Draft

The consultant will prepare, in accordance with CEQA, an administrative draft of a program level Environmental Impact Report (EIR), and all associated technical studies for review by County staff. The Program EIR will analyze the project objectively and address all significant environmental issues identified during scoping. The Program EIR will specifically address environmental concerns identified during plan development, at the public scoping meeting, and raised by Responsible and Trustee agencies, and by County staff. A preliminary Draft EIR outline is provided in Attachment G.

Prior to beginning any technical analyses for individual subject areas of the Program EIR, the consultant will submit to the County for review a Draft EIR annotated outline and a memorandum describing the methods and assumptions to be used in the analysis (such as software, modeling techniques, significance thresholds, etc.). It should be noted that a substantial amount of environmental setting information has been developed for the site, as presented in the 2018 WRT Existing Conditions Assessment. As environmental impacts are identified, feedback to project alternatives, policies and standards in the Specific Plan will be provided to ensure the Plan is self-mitigating, as noted above.

A Mitigation Monitoring and Reporting Program, consisting of a separate list of all proposed mitigation measures, will also be developed. Each measure will include a brief discussion of the monitoring required, responsible parties, and timeframe for implementation.

County departments will coordinate and provide non-contradictory comments on the administrative draft. County staff will meet with the consultant as needed to discuss comments. Consultant will revise the administrative draft as required and provide a clean copy for County staff to conduct a final review. Once the final review has been completed and the administrative draft revised as required, one screen copy of the Draft Program EIR will be submitted to the County for final review by staff before publication. The consultant will print copies of the approved screen copy for distribution in compliance with requirements set forth below.

Deliverables:

- *Administrative Draft of Program EIR*
- *Mitigation Monitoring Plan*

Draft Program EIR – Public Release

The consultant will coordinate with the County to publish and distribute the Draft Program EIR to the State Clearinghouse, all responsible and trustee agencies and other interested parties. The Draft Program EIR shall also be made available digitally and on the Permit Sonoma website to facilitate public access. The consultant will include the Program EIR findings in the community workshop presentations on the Public Review Draft Specific Plan and will present at a Public Hearing on the Draft Specific Plan and EIR before the Planning Commission. The consultant and County staff will compile all written and verbal comments received during the public review period for the Draft Program EIR.

Deliverables:

- *List of comment letters and commenting entities(digital format)*
- *Compilation of comments received (digital format)*
- *Draft Program EIR*

Prepare Administrative Final Program EIR

The consultant will work with County staff when preparing responses to comments received during the EIR public review period and at the public hearings. The consultant will prepare an administrative draft of the Final Program EIR consisting of a summary of all verbal comments received during hearings on the Draft Program EIR, all written comments, responses to all the comments as required by the State CEQA Guidelines, and appropriate corrections and revisions to the text of the Draft Program EIR. All written comments will be numbered and any necessary changes to the text of the Draft Program EIR or the Mitigation Monitoring and Reporting Program will be highlighted, and responses keyed to the appropriate comment numbers.

Once review by County staff is complete, the Consultant will make all necessary revisions and provide copies of the final document as described below.

Deliverables:

- *Administrative Final Program EIR*
- *Final Program EIR*
- *Mitigation Monitoring and Reporting Program*

Present the Final Specific Plan and Program EIR

The Consultant Team will attend public hearings conducted by the Planning Commission and Board of Supervisors to consider the certification of the Final Program EIR and adoption of the Specific Plan. General Plan policy and zone changes necessary to implement the Specific Plan will be identified and presented for consideration along with the Specific Plan and EIR.

Following approval of the Specific Plan and the Program EIR, the consultant will make any required modifications. The consultant will then provide the County with clean copies of the final approved documents as indicated below.

Deliverables:

- *Hearing materials, slides, handouts, diagrams, etc.*
- *Final Specific Plan (hearing copies)*
- *Final Program EIR and Mitigation Monitoring Plan (hearing copies)*
- *The Specific Plan, final approved version*
- *Certified Program EIR and Mitigation Monitoring Plan*

C. Document Formatting

All documents shall be prepared in a user friendly format that is compliant with the County's Americans with Disabilities Act (ADA) requirements **and meet the requirements of Attachment F, "Digital Deliverables."** This will include verifying that all PDFs submitted include legible text, and hyperlinks are not used in any PDF documents intended for publication on the County website.

D. Local Preference

Sonoma County promotes employment and business opportunities for local residents and firms on all contracts and gives preference to local residents, workers, businesses and consultants to the extent consistent with the law and interests of the public. A Local Service Provider is defined as a business or consultant who has a valid physical address located within Sonoma County from which the supplier or consultant operates or performs business on a day-to-day basis, and holds a valid business license if required by a city within the jurisdiction of Sonoma County.

For quantitative evaluations of proposals, the locality of the service provider shall be included as an evaluation criterion in RFPs. Extra percentage weighting of 5% shall be provided in the total rating score for local service providers. For qualitative evaluations of proposals, Departments shall consider the locality of consultants or businesses and their sub-consultants along with other criteria identified in the RFP. If there is more than one service provider being considered and the providers are competitively matched in terms of other criteria, local service providers should be selected. If hiring sub-consultants, the County strongly encourages using local service providers. More information about the County's purchasing policies can be found on:

[Local Preference Policy for Services](#)

E. Project Cost

The project budget shall not exceed \$1.45 million and all proposals shall retain a minimum 10% project contingency within the not-to-exceed amount.

F. Schedule

The following schedule is subject to change. Except as provided below, changes will only be made by written amendment to this Request for Proposals, which amendment shall be issued to all parties by the Department issuing this proposal.

DATE	EVENT
May 24, 2019	Release Request for Proposals
June 05, 2019	Pre-proposal Conference Permit Sonoma Hearing Room 2:00 PM – 4:00 PM 2550 Ventura Ave Santa Rosa, CA 95403
June 10, 2019	Proposer’s Questions Due by 5:00 p.m.
June 19, 2019	County’s Responses to Questions Distributed
July 12, 2019	Proposals Due by 2:00 p.m.
Aug. 2, 2019	Proposals Evaluated by County
Aug. 5-9, 2019	Interviews Conducted
By Aug. 31, 2019	Notice of Intent to Award (<i>subject to delay without notice</i>)
By Sept. 6, 2019	Board of Supervisors Awards Contract (<i>subject to delay without notice</i>)

G. Pre-Proposal Conference

An optional but highly recommended pre-proposal conference is scheduled on June 5, 2019 from 2:00 PM – 4:00 PM at PRMD (address above) for all prospective bidders. The conference will include a brief introduction to the project by staff, followed by an extended Q&A.

H. Questions

Proposers will be required to submit any questions on the RFP electronically or in writing by 5:00PM June 10, 2019 in order for staff to prepare written responses to all consultants. Written answers will be shared with all potential bidders through an addendum on the County's Supplier Portal and email notification. Questions should be sent via e-mail directly to: milan.nevajda@sonoma-county.org. Questions will not be accepted by phone.

I. Corrections and Addenda

1. If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the proposer shall immediately notify the contact person of such error in writing and request clarification or modification of the document. Modifications will be made by addenda as indicated below to all parties in receipt of this RFP.
2. If a proposer fails to notify the contact person prior to the date fixed for submission of proposals of a known error in the RFP, or an error that reasonably should have been known, the proposer shall submit a proposal at their own risk, and if the proposer is awarded a contract they shall not be entitled to additional compensation or time by reason of the error or its subsequent correction.
3. Addenda issued by the County interpreting or changing any of the items in this RFP, including all modifications thereof, shall be incorporated in the proposal. The proposer shall submit the addenda cover sheet with the proposal (or deliver them to the Sonoma County Permit and Resource Management Department, 2550 Ventura Avenue, Santa Rosa, CA 95403, if the proposer has previously submitted a proposal to the Department). Any oral communication by the County's designated contact person or any other County staff member concerning this RFP is not binding on the County and shall in no way modify this RFP or any obligations arising hereunder.

J. Proposal Submittal

1. Proposers must submit one (1) electronic copy to the County's supplier portal at: <https://esupplier.sonomacounty.ca.gov/psp/FNPRD/SUPPLIER/ERP/h/?tab=DEFAULT>

Note: Proposers must be registered to submit electronic submittals. See registration instructions on the Supplier Portal link above.

2. In addition to the electronic copy, proposers must submit one (1) signed original and six (6) copies of the signed proposal per the schedule or as revised by addendum. Proposals must be enclosed in a sealed envelope or package and clearly marked "**SDC SPECIFIC PLAN.**" Proposals shall be submitted to:
Sonoma County Permit Sonoma Department
2550 Ventura Avenue
Santa Rosa, CA 95403
Attn: Milan Nevajda

3. **Due Date:** Proposals must be received no later than the date and time in the proposal schedule (Section F) or as revised by an addendum to this RFP. The proposal due date is subject to change. If the proposal due date is changed, all known recipients of the original RFP will be notified of the new date.
4. **General Instructions:** To receive consideration, proposals shall be made in accordance with the following general instructions:
 - a) The completed proposal must be made in writing and shall be without alterations or erasures.
 - b) The submission of a proposal shall be an indication that the proposer has investigated and satisfied him/herself as to the conditions to be encountered, the character, quality and scope of the work to be performed, and the requirements of the County, including all terms and conditions contained within this RFP.
 - c) Proposals shall be limited to no more than 35 pages, excluding resumes.
 - d) Proposal Format and Contents: For ease of review and to facilitate evaluation, the proposals for this project shall be organized and presented as follows:
 - a) **Section I - Organizational Information:**

Provide specific information concerning the firm in this section, including the legal name, address and telephone number of your company and the type of entity (sole proprietorship, partnership, or corporation and whether public or private). Include the name and telephone number of the person(s) in your company authorized to execute the proposed contract. If two or more firms are involved in a joint venture or association, the proposal must clearly delineate the respective areas of authority and responsibility of each party. An organizational chart shall be provided to illustrate roles and responsibilities for the project. All parties signing the Agreement with the County must be individually liable for the completion of the entire project even when the areas of responsibility under the terms of the joint venture or association are limited.
 - b) **Section II - Qualifications and Experience:**

Provide specific information concerning the firm's experience in the services specified in this RFP, preferably within the State of California. Examples of completed projects of similar scope/scale, as current as possible, should be submitted, as appropriate. **References are required.** Please provide names, addresses, and telephone numbers of contact persons within three (3) client agencies for whom similar services have been provided.

Debarment or Other Disqualification

Proposer must disclose any debarment or other disqualification as a vendor for any federal, State or local entities. Proposer must describe the nature of the debarment/disqualification, including where and how to find such detailed information

Firm Description

Provide a description of the firm, number of years in business, and its core competencies.

Personnel Descriptions

Provide brief summaries of relevant experience and qualifications for all key personnel. Provide the name of the Project Manager primarily responsible for overall management of the work and the main contact for County staff. In addition, State the length of time the proposed Project Manager has been with the consulting firm and provide individual project references.

Provide names and backgrounds of the people (including subcontractors) who will be responsible for completing the work.

Resumes or other written material describing the consultant's technical staff qualifications and descriptions of similar work completed by each should be attached at the end of the proposal.

Project Management

Describe the project management structure and methods, tools, and actions that will be implemented to ensure that the project is completed on time and within budget.

c) Section III - Project Approach and Work Schedule:

Provide a description of the methodology developed to perform all required services included in the Statement of Requirements as referenced in subsection b), including:

1. A brief outline of the proposed format of the Specific Plan and EIR.
2. A description of the proposed work program by task, including the approach and methodology to be used to address each of the major issues, including proposed technical studies. Any proposed work beyond that requested in this RFP shall be costed separately and shall be clearly identified as "optional."

3. A detailed project schedule that will complete the project expeditiously through adoption by December, 2021. The schedule should contain specific milestones and dates of completion which will be used to set internal schedules.
4. Identify the extent of County personnel involvement deemed necessary, including key decision points at each stage of the project.

d) Section IV - Cost of Service:

The proposal shall clearly state ALL costs associated with the project, broken down by category of products and services, and all on-going costs for recommended or required products and services including travel.

The project costs must be broken out and include all expenses that will be charged to the County, including but not limited to hourly rates for labor for prime consultant staff and subcontractors, software costs, software maintenance costs, implementation fees, shipping, insurance, communications, documentation reproduction, and all expenses, including travel, meal reimbursement, hotel per diems, taxes, etc. Failure to clearly identify all costs associated with the proposal may be cause for rejection of the Consultant's proposal.

Include hours, rates, and costs by person and subcontractor for each work task and deliverable. Include a schedule of rates for extra work, additional report copies, and attendance at additional hearings.

e) Section V – Identification of subcontractors:

Proposers shall identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate:

- Qualifications
- Products and/or services supplied
- Percentage of the overall scope of work assigned to subcontractor
- Local provider determination

f) Section VI – Insurance:

The selected proposer will be required to submit and comply with all insurance as described in the attached Sample Agreement. Securing this insurance is a condition of award for this contract.

g) Section VII – Additional Information:

Include any other information you believe to be pertinent but not required.

h) Section VIII – Contract Terms:

Proposers must include a statement acknowledging their willingness to accept the sample contract terms (Attachment B) or identify specific exceptions to the sample agreement.

K. Selection Process

1. All proposals received by the specified deadline will be reviewed by the County for content, including but not limited to fee, scope of work, related experience and professional qualifications of the bidding consultants.
2. County employees will not participate in the selection process when those employees have a relationship with a person or business entity submitting a proposal which would subject those employees to the prohibition of §87100 of the Government Code. Any person or business entity submitting a proposal who has such a relationship with a County employee who may be involved in the selection process shall advise the County of the name of the County employee in the proposal.
3. Proposals will be evaluated using the following criteria:
 - a) 30% - Demonstrated ability to perform the services described, including:
 - experience, qualifications and expertise in preparing the necessary conditions and analysis reports, Specific Plans and related CEQA documentation;
 - A history of providing similar services to comparable entities;
 - Familiarity with the community
 - Quality of work as verified by references; and
 - Willingness to accept the County’s contract terms.
 - b) 25% - Project schedule, management approach, and ability to perform the work on schedule;
 - c) 20% - Community Engagement Plan and experience in community engagement;
 - d) 20% - Hours proposed and cost relative to the scope of services;
 - e) 5% - Local service provider status.
4. The County Department Head in consultation with the Purchasing Agent reserves the right, in their sole discretion, to take any of the following actions at any time before Board approval of an award: waive informalities or minor irregularities in any proposals received, reject any and all proposals, cancel the RFP, or modify and re-issue the RFP. Failure to furnish all information requested or to follow the format requested herein may disqualify the proposer, in the sole discretion of the County. False, incomplete, misleading or unresponsive statements in a proposal may also be sufficient cause for a proposal’s rejection.

5. The County may, during the evaluation process, request from any proposer additional information which the County deems necessary to determine the proposer's ability to perform the required services. If such information is requested, the proposer shall be permitted three (3) business days to submit the information requested.
6. An error in the proposal may cause the rejection of that proposal; however, the County may, in its sole discretion, retain the proposal and make certain corrections. In determining if a correction will be made, the County will consider the conformance of the proposal to the format and content required by the RFP, and any unusual complexity of the format and content required by the RFP. If the proposer's intent is clearly established based on review of the complete proposal submittal, the County may, at its sole option, correct an error based on that established content. The County may also correct obvious clerical errors. The County may also request clarification from a proposer on any item in a proposal that County believes to be in error.
7. The County reserves the right to select the proposal which in its sole judgment best meets the needs of the County. ***The lowest proposed cost is not the sole criterion for recommending contract award.***
8. All firms responding to this RFP will be notified of their selection or non-selection after the evaluation committee has completed the selection process.
9. Generally, the firm selected by the Evaluation Committee will be recommended to the Board of Supervisors for this project, but the Board is not bound to accept the recommendation or award the project to the recommended firm.

L. Finalist Interviews

After initial screening, the evaluation committee may select those firms deemed most qualified for this project for further evaluation. Interviews of these selected firms will be conducted as part of the final selection process. Interviews may or may not have their own separate scoring during the evaluation process.

M. General Information

1. Rules and Regulations

- a) The issuance of this solicitation does not constitute an award commitment on the part of the County, and the County shall not pay for costs incurred in the preparation or submission of proposals. All costs and expenses associated with the preparation of this proposal shall be borne by the proposer.
- b) Sonoma County reserves the right to reject any or all proposals or portions thereof if the County determines that it is in the best interest of the County to do so.
- c) The County may waive any deviation in a proposal. The County's waiver of a deviation shall in no way modify the RFP requirements nor excuse the successful proposer from full

compliance with any resultant agreement requirements or obligations. Sonoma County reserves the right to reject any or all proposals, or to waive any defect or irregularity in a proposal. The County further reserves the right to award the agreement to the proposer or proposers that, in the County's judgment, best serves the needs of Sonoma County.

- d) All proposers submit their proposals to the County with the understanding that the recommended selection of the review committee is final and subject only to review and final approval by the Department Director (via delegation), the County Purchasing Agent or the Board of Supervisors.
- e) Upon submission, all proposals shall be treated as confidential documents until the selection process is completed. Once the notice of intent to award is issued by the County, all proposals shall be deemed public record. In the event that a proposer desires to claim portions of its proposal exempt from disclosure, it is incumbent upon the proposer to clearly identify those portions with the word "Confidential" printed on the top right hand corner of each page for which such privilege is claimed, and to clearly identify the information claimed confidential by highlighting, underlining, or bracketing it, etc. Examples of confidential materials include trade secrets. Each page shall be clearly marked and readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal. The County will consider a proposer's request for exemptions from disclosure; however, the County will make its decision based upon applicable laws. An assertion by a proposer that the entire proposal, large portions of the proposal, or a significant element of the proposal, are exempt from disclosure will not be honored and the proposal may be rejected as non-responsive. Prices, makes and models or catalog numbers of the items offered, deliverables, and terms of payment shall be publicly available regardless of any designation to the contrary.
- f) The County will endeavor to restrict distribution of material designated as confidential to only those individuals involved in the review and analysis of the proposals. Proposers are cautioned that materials designated as confidential may nevertheless be subject to disclosure. Proposers are advised that the County does not wish to receive confidential or proprietary information and those proposers are not to supply such information except when it is absolutely necessary. If any information or materials in any proposal submitted are labeled confidential or proprietary, the proposal shall include the following clause:
 - a. [Legal name of proposer] shall indemnify, defend and hold harmless the County of Sonoma, its officers, agents and employees from and against any request, action or proceeding of any nature and any damages or liability of any nature, specifically including attorneys' fees awarded under the California Public Records Act (Government Code §6250 et seq.) Arising out of, concerning or in any way involving any materials or information in this proposal that [legal name of proposer] has labeled as confidential, proprietary or otherwise not subject to disclosure as a public record.

2. Non-liability of County

The County shall not be liable for any pre-contractual expenses incurred by the proposer or selected contractor or contractors. The County shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

3. Proposal Alternatives

Proposers may not take exception or make material alterations to any requirement of the RFP. Alternatives to the RFP may be submitted as separate proposals and so noted on the cover of the proposal. The County reserves the right to consider such alternative proposals, and to award an agreement based thereon if it is determined to be in the County's best interest and such proposal satisfies all minimum qualifications specified in the RFP. Please indicate clearly in the proposal that the proposal offers an alternative to the RFP.

4. Lobbying

Any party submitting a proposal or a party representing a proposer shall not influence or attempt to influence any member of the selection committee, any member of the Board of Supervisors, or any employee of the County of Sonoma, with regard to the acceptance of a proposal. Any party attempting to influence the RFP process through ex-parte contact may be subject to rejection of their proposal.

5. Form of Agreement

- a) No agreement with the County shall have any effect until a contract has been signed by both parties. Pursuant to Sonoma County Code Section 1-11, County personnel are without authorization to waive or modify agreement requirements.
- b) A sample of the agreement is included as Attachment B hereto. Proposers must be willing to provide the required insurance and accept the terms of this sample agreement.
- c) Proposals submitted shall include a statement that (i) the proposer has reviewed the sample agreement and will agree to the terms contained therein if selected, or (ii) all terms and conditions are acceptable to the proposer except as noted specifically in the proposal. A proposer taking exception to the County's sample agreement must also provide alternative language for those provisions considered objectionable to the proposer. Please note that any exceptions or changes requested to the Agreement may constitute grounds to reject the proposal.
- d) Failure to address exceptions to the sample agreement in your proposal will be construed as acceptance of all terms and conditions contained therein.
- e) Submission of additional contract exceptions after the proposal submission deadline may result in rejection of the consultant's proposal.

6. Duration of Proposal; Cancellation of Awards; Time of the Essence

- a) All proposals will remain in effect and shall be legally binding for at least ninety (90) days.
- b) Unless otherwise authorized by the County, the selected consultant will be required to execute an agreement with the County for the services requested within sixty (60) days of the County's notice of intent to award. If agreement on terms and conditions acceptable to the County cannot be achieved within that timeframe, or if, after reasonable attempts to negotiate such terms and conditions, it appears that an agreement will not be possible, as determined at the sole discretion of the County, the County reserves the right to retract any notice of intent to award and proceed with awards to other consultants, or not award at all.

7. Withdrawal and Submission of Modified Proposal

- a) A proposer may withdraw a proposal at any time prior to the submission deadline by submitting a written notification of withdrawal signed by the proposer or his/her authorized agent. Another proposal may be submitted prior to the deadline. A proposal may not be changed after the designated deadline for submission of proposals.

N. Protest Process

Any and all protests must be in writing and must comply with the timelines and procedures set forth at: [*Protests and Appeals for Goods and Professional Services Procurements*](#)

O. Living Wage

The contractor/franchisee/economic development assistance recipient shall comply with any and all federal, state, and local laws – including, but not limited to the County of Sonoma Living Wage Ordinance – affecting the services provided by this contract/franchise agreement. Without limiting the generality of the foregoing, the contractor/franchisee/economic development assistance recipient expressly acknowledges and agrees that this contract/franchise/economic development assistance agreement is subject to the provisions of Article XXVI of Chapter 2 of the Sonoma County Code, requiring payment of a living wage to covered employees. Noncompliance during the term of the contract/franchise/economic development assistance agreement will be considered a material breach and may result in termination of the contract/franchise/economic development assistance agreement or pursuit of other legal or administrative remedies.

The link to the Living Wage Ordinance is:

<http://sonomacounty.ca.gov/CAO/Living-Wage-Ordinance/>

Attachments:

- Attachment A: Project Area Map
- Attachment B: Professional Services Agreement - Sample
- Attachment C: Disadvantaged Business Enterprises (DBE) information
- Attachment D: Local Business Declaration for Services
- Attachment E: Living Wage Solicitation Form
- Attachment F: Digital Deliverables
- Attachment G: County of Sonoma Contract Insurance Requirements
- Attachment H: Preliminary Draft Program EIR Outline