



C o u n t y o f S a n L u i s O b i s p o

# General Services Agency

Janette D. Pell, General Services Agency Director

Helen McCann, Department Administrator

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## **REQUEST FOR PROPOSAL PS- # 1049 PUBLIC OUTREACH, EDUCATION AND PARTICIPATION IN THE LAND USE AND TRANSPORTATION ELEMENT UPDATE**

October 6, 2009

The County of San Luis Obispo is currently soliciting proposals for professional services for Public Outreach, Education and Participation in the Land Use and Transportation Element Update.

Each proposal shall specify each and every item as set forth in the attached specifications. Any and all exceptions must be clearly stated in the proposal. Failure to set forth any item in the specifications without taking exception, may be grounds for rejection. The County of San Luis Obispo reserves the right to reject all proposals and to waive any informalities.

If your firm is interested and qualified, please submit six (6) hardcopies of your proposal and one (1) electronic copy by 3:00 p.m. on October 30, 2009 to:

County of San Luis Obispo  
Phill Haley, Purchasing  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408

If you have any questions about the proposal process, please contact me. For technical questions and information contact Jamie Lopes at (805) 781-5975 ([jlopes@co.slo.ca.us](mailto:jlopes@co.slo.ca.us)) or Mike Wulkan at (805) 781-5608 ([mwulkan@co.slo.ca.us](mailto:mwulkan@co.slo.ca.us)).

PHILL HALEY  
Buyer - PURCHASING  
[phaley@co.slo.ca.us](mailto:phaley@co.slo.ca.us)

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**PUBLIC OUTREACH, EDUCATION AND PARTICIPATION IN THE**  
**LAND USE AND TRANSPORTATION ELEMENT UPDATE**

**TO:            ALL PROSPECTIVE PROPOSERS**  
**SUBJECT:    LOCAL PROPOSERS PREFERENCE**

The County of San Luis Obispo has established a local vendor preference. All informal and formal Request for Proposals for contracts will be evaluated with a 5% preference for local vendors. Note the following exceptions:

1.     Those contracts which State Law or, other law or regulation precludes this local preference.
2.     Public works construction projects.

A "local" vendor will be approved as such when, 1) It conducts business in an office with a physical location within the County of San Luis Obispo; 2) It holds a valid business license issued by the County or a city within the County; and 3) Business has been conducted in such a manner for not less than six (6) months prior to being able to receive the preference.

As of March 3, 1994 individual County Buyers evaluate RFP's (Request For Proposals) considering the local vendor preference described above. The burden of proof will lie with proposers relative to verification of "local" vendor preference. Should any questions arise, please contact a buyer at (805) 781-5200. All prospective proposers are encouraged to quote the lowest prices at which you can furnish the items or services listed in County proposals.

	YES	NO
Do you claim local vendor preference?		
Do you conduct business in an office with a physical location within the County of San Luis Obispo?		
Business Address: _____ _____		
Years at this Address: _____		
Does your business hold a valid business license issued by the County or a City within the County?		
Name of Local Agency which issued license: _____		

Business Name: \_\_\_\_\_

Authorized Individual: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Dated: \_\_\_\_\_

**PROPOSAL SUBMITTAL AND SELECTION**

1. All proposals, consisting of 6 (six) hardcopies and one (1) electronic copy must be received by mail, recognized carrier, or hand delivered no later than 3:00 p.m. on October 30, 2009. Late proposals will not be considered.
2. All correspondence should be directed to:

San Luis Obispo County  
General Services Agency  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408  
ATTENTION: Phill Haley  
Telephone: 805-781-5904
3. Costs of preparation of proposals will be borne by the proposer.
4. It is preferred that all proposals be submitted on recycled paper, printed on two sides.
5. Selection of qualified proposers will be by an approved County procedure for awarding professional contracts.
6. This request does not constitute an offer of employment or to contract for services.
7. The County reserves the option to reject any or all proposals, wholly or in part, received by reason of this request.
8. The County reserves the option to retain all proposals, whether selected or rejected.
9. All proposals shall remain firm for sixty, (60) days following closing date for receipt of proposals.
10. The County reserves the right to award the contract to the firm who presents the proposal which in the judgment of the County, best accomplishes the desired results, and shall include, but not be limited to a consideration of the professional service fee.
11. Selection will be made on the basis of the proposals as submitted. The Selection Committee may deem it necessary to interview applicants. The County retains the right to interview applicants as part of the selection process.
12. The proceedings of the Selection Committee are confidential. Members of the Selection Committee are not to be contacted by the proposers.

## **PROPOSAL FORMAT**

A qualifying proposal must address all of the following points:

1. Project Title
2. Applicant or Firm Name
3. Firm Qualifications
  - a. Type of organization, size, professional registration and affiliations.
  - b. Names and qualifications of personnel to be assigned to this project.
  - c. Outline of recent projects completed that are directly related to this project. Consultant is required to demonstrate specific design and project expertise relating to the requirements of the Project Scope.
  - d. Qualifications of consultants, subcontractors, or joint venture firm, if appropriate.
  - e. Client references from recent related projects, including name, address and phone number of individual to contact for referral.
4. Understanding of and Approach to the Project
  - a. Summary of approach to be taken.
  - b. Description of the organization and staffing to be used for the project.
  - c. Indication of information and participation the proposer will require from County staff.
  - d. Indication of time frame necessary to complete the plan review once a Notice to Proceed is issued.
5. Fees and Insurance
  - a. Propose total fixed fees to complete project as described under Project Scope.
  - b. The selected Consultant will be required to provide insurance coverage in the amount of \$ 500,000 General Liability Insurance and \$ 500,000 of Professional Liability Insurance. This amount of insurance coverage shall be reflected in your estimated professional fee.

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- c. The Consultant shall provide within five (5) days after the Notice of Award is issued a certificate of liability insurance naming the County of San Luis Obispo and its employees and officers as additionally named insured. This shall be maintained in full force and effect for the duration of the contract and must be in an amount and format satisfactory to the County.
- d. Consultant shall defend, indemnify and hold harmless the County, its officers and employees from all claims, demands, damages, costs, expenses, judgments, attorney fees, liabilities or other losses that may be asserted by any person or entity, and that arise out of or are made in connection with the acts or omissions relating to the performance of any duty, obligation, or work hereunder. The obligation to indemnify shall be effective and shall extend to all such claims and losses, in their entirety, even when such claims or losses arise from the comparative negligence of the County, its officers and employees. However, this indemnity will not extend to any claims or losses arising out of the sole negligence or willful misconduct of the County, its officers and employees.

The preceding paragraph applies to any theory of recovery relating to said act or omission, by the Consultant, or its agents, employees, or other independent contractors directly responsible to Consultant including, but not limited to the following:

1. Violation of statute, ordinance, or regulation.
2. Professional malpractice.
3. Willful, intentional or other wrongful acts, or failures to act.
4. Negligence or recklessness.
5. Furnishing of defective or dangerous products.
6. Premises liability.
7. Strict Liability.
8. Violation of civil rights.
9. Violation of any federal or state statute, regulation, or ruling resulting in a determination by the Internal Revenue Service, California Franchise Tax Board or any other California public entity responsible for collecting payroll taxes, when the Consultant is not an independent contractor.

It is the intent of the parties to provide the County the fullest indemnification, defense, and "hold harmless" rights allowed under the law. If any word(s) contained herein are deemed by a court to be in contravention of applicable law, said word(s) shall be severed from this contract and the remaining language shall be given full force and effect.

## **SECTION 1 - GENERAL INFORMATION**

### **1.1 PURPOSE**

The purpose of this Request for Proposals (RFP) is to provide consulting firms with enough information to submit proposals to maximize public outreach, education and participation in the update of the Land Use and Transportation Elements (LUTE) for the County of San Luis Obispo (see attached summary and work plan).

### **1.2 RIGHT OF REJECTION**

The County reserves the right to reject any or all proposals received as a result of this request. The County will not pay for any information contained in the proposals obtained from participating firms. The County is not liable for costs incurred by firms prior to issuance of a contract. The County also may negotiate separately with any source in any manner necessary to serve the best interest of the County. This request for proposals is made for information and planning purposes only. Awards (if made) will not be made solely on the basis of proposals resulting from this request.

### **1.3 HOW TO SUBMIT PROPOSALS**

In order for proposals to be examined and evaluated by the Department of Building and Planning, the County requests six (6) hardcopies of the proposal and one electronic copy, including any supportive materials. Proposals must be delivered no later than 3 p.m., October 30, 2009. Please ship copies so as to insure prompt delivery to:

COUNTY OF SAN LUIS OBISPO  
GENERAL SERVICES AGENCY  
PHILL HALEY, PURCHASING  
1087 SANTA ROSA ST  
SAN LUIS OBISPO, CA 93408

Once submitted, the proposals and any supplementary documents become the property of the County.

### **1.4 ACCEPTANCE OF PROPOSAL CONTENT**

If a contract is awarded as a result of a response to this request, the County will select the successful individual or firm as quickly as possible after the final date for receipt of the proposals. However, final award is contingent upon successful contract(s) negotiation.

It is likely that the content of the proposal of the successful bidder will be used in a legal contract of agreement. Bidders should be aware that methods and procedures proposed are likely to become contractual obligations.

### **1.5 INQUIRIES**

If the consultant has any questions regarding this RFP, contact Jamie Lopes at (805) 781-5975 (jlopes@co.slo.ca.us) or Mike Wulkan at (805) 781-5608 (mwulkan@co.slo.ca.us).

## 1.6 CONTRACT AMOUNT

The consultant shall prepare a fixed cost estimate not to exceed roughly \$50,000 for the services requested in this RFP. The not-to-exceed cost may include the extent of work that the consultant considers realistic to comply with this scope of work. Additional meetings, community meetings, public hearings, and other tasks may be bid on a time and materials basis. Preparation of documents shall be proposed based on deliverable products.

## 1.7 PROJECT LOCATION

The public outreach, education and participation project shall address the unincorporated County jurisdiction. It will provide information and activities in several media and events that address countywide, sub-regional and local rural and urban area populations.

## 1.8 BACKGROUND

The County Department of Planning and Building has been authorized by the Board of Supervisors to prepare a comprehensive consolidation and revision of the Land Use and Circulation Elements of the County General Plan. This effort will focus on the rural, unincorporated areas of the county, excluding the areas within individual community plans for the 10 urban areas and 14 villages. The focus will be at the countywide, regional and rural levels. The project will implement recently adopted Strategic ("smart") Growth policies and strategies in the Land Use Element's Framework for Planning, as well policies and strategies in the updated Housing Element and the Conservation and Open Space Element (currently in public hearings).

The LUTE update will take a comprehensive, regional approach to growth, resource and transportation issues in the unincorporated areas of the county through the year 2035. It will be guided by the following major themes:

- *Sustainable resources*
- *Infrastructure planning*
- *Employment and housing opportunities*
- *Economic vitality*
- *Rural character*
- *Habitat conservation and biological resources*
- *Collaboration with communities, cities, special districts, and agencies*

The following are among the key topics in the LUTE update:

- *Identification of the land and resource needs for future growth*
- *Identification of least constrained areas to accommodate future growth*
- *Urban/rural interface issues such as community separators and how development occurs at the edges of communities*
- *Rural development policies to limit inappropriate rural development, avoid sprawl, protect agricultural resources and rural character, focus development in areas with adequate resources and services, and reduce vehicle miles traveled*

Staff will reorganize and revise the existing Land Use and Circulation Elements to:

- Consolidate 15 area plans into three inland and one or two coastal-zone plans, together with their land use maps and Land Use Ordinance standards;
- Consolidate and/or eliminate repetitive or similar policies and standards; and
- Revise and establish new standards to implement the new approach and policies.

The project will be roughly parallel to and closely linked with two other related ones: 1) Climate Action Plan (CAP) for the County of San Luis Obispo, implementing AB32, and 2) Sustainable Communities Strategy (SCS) for the San Luis Obispo Council of Governments, implementing SB375. These projects will have their own public participation efforts that are separately funded. We anticipate coordinating the public outreach efforts for this project with the CAP and the SCS.

## **SECTION 2 – PROPOSED SCOPE OF WORK**

The following is intended to provide the consultant a basis on which to prepare a proposal. This will include the overall process envisioned (and what role the consultant would play), what tasks or information are expected to be completed by the consultant and what would be prepared by staff.

### **2.1 GENERAL REQUIREMENTS/OVERVIEW OF TASKS**

A majority of the work will entail development of approaches to encourage maximum public exposure to and involvement in the process. Extensive public outreach and education efforts are expected to include traditional media and more progressive methods. The following is an overview of the tasks to be completed:

1. Develop an overall strategy for reaching people effectively, addressing anxiety and controversy, stressing benefits, and obtaining feedback from people in a variety of formats.
2. Prepare an initial, intensive but sustained 5-month public education program in several media to inform about growth trends, resources and public facilities, recent sustainable planning policies, and the goals and process of the Project including workshops and other events.
3. Prepare a public feedback program to effectively obtain comments and questions.
4. Prepare periodic education programs to inform the public about workshops, publications and hearings.
5. Organize several workshops and conduct them together with staff.

## 2.2 BACKGROUND INFORMATION

To provide background information and facilitate the timely preparation of proposals and the environmental documents, the following documents are available for review in the Long Range Planning division of the Department of Planning and Building. Many of these documents are available on the Department web site, [www.sloplanning.org](http://www.sloplanning.org).

- Framework for Planning - Part I of the Land Use Element – Strategic Growth policies
- Land Use Element Area Plans
- Previous public education and participation materials and meeting records
- Growth Management Ordinance (Title 26)
- Resource Management System Summary Report (2008)
- Agriculture and Open Space Element (1998)
- Technology resources: GIS data and maps; online survey capability
- Draft Conservation and Open Space Element
- County Land Use Ordinance (Titles 22 and 23)
- RFP and work program for Climate Action Plan
- Description of the Sustainable Community Strategy process from SLOCOG

## 2.3 GENERAL INFORMATION

The consultant shall assist the County to develop an extensive public outreach program, assist in public education and workshops, and develop a public feedback program.

## 2.4 Tasks

### Task 1 Review Existing Information Base:

The consultant shall familiarize him/herself with the documents listed above and the Scope of Work and time lines for the LUTE update. Documents to review include:

- a. Framework for Planning - Inland Area
- b. Previous public education and participation materials

### Task 2 Public Outreach and Education Programs

The consultant will develop and implement *general* public outreach and education programs at appropriate times during the LUTE process. The purpose of the public outreach and education programs is to educate, inform, engage, and solicit feedback from the general public and stakeholder groups regarding countywide, sub-regional and local issues concerning land use and transportation.

The consultant shall supply the County with an education program which will engage the general public, Cities, districts and stakeholders on the following and other planning initiatives and content to be provided by the County:

1. Strategic growth policies and strategies for livable, complete communities; preserving rural character.
2. Housing needs

3. Infrastructure and transportation constraints to growth and their development costs
4. Constraints in the natural environment that guide decisions about growth
5. Economic development needs, impacts and benefits
6. Land use and transportation projections, issues, trends, analyses, and alternative scenarios
7. Climate change, State statutes and local implementation such as the Climate Action Plan and Sustainable Communities Strategy

### **Task 3 Public Outreach and Education Work Planning**

The consultant shall develop a coordinated outreach program to carry out Task 2 in conjunction with the CAP and SCS. It shall be designed to maximize public participation, consistent with the Coastal Act of 1976. It shall include the following major components:

1. Guidance and assistance on cost-effective techniques to maximize public outreach and participation throughout the process
2. Initial, escalating presence and messages at the outset of the process concerning the start of the project, its features, goals and outcomes
3. Process and content that recognize and speak to the concerns and interests of the entire spectrum of political views that are held in San Luis Obispo County, recognizing that these contemporary issues and solutions need broad public awareness and support
4. Information about major reports such as a constraints analysis, trend analysis and environmental impact report
5. Additional messages about local values, heritage and visions, as they are affected by recent trends, in conjunction with public workshops on 1) vision and 2) plan alternatives.
6. Continued messages about the project as the project description is completed, Public Review Draft, Public Hearing Draft and Draft Environmental Impact Report are published
7. Messages about the public hearings at the Planning Commission and the Board of Supervisors
8. Continuing and periodic feedback projects and assessments, using variety of media
9. Strategy on obtaining feedback through surveys, on the issues and the draft plans

The proposal shall evaluate the following:

1. Social networking media (e.g Facebook, MySpace, Youtube, etc.)
2. Website within the County's Granicus system for all LUTE activity
3. Traditional print media including brochures, flyers, handouts, advertising and news releases and articles; creation of a logo or theme to be used on such materials
4. Announcements, programs, scripts and production for radio and television
5. Strategies and agendas for targeted meetings with interest groups including business, agriculture, environmental and social justice organizations, culminating in consolidated meetings with all participants
6. A "schools program" to be developed and carried out in targeted area schools. Two workshops in at least four proposed planning areas (total of at least 8 workshops): North County, Central County, South County, and the coastal zone
7. Cooperation with staff and other County consultants working on other documents, including the Climate Action Plan, green building ordinance and the Sustainable Communities Strategy

8. Techniques to identify and address different stakeholders and groups; the most effective techniques for holding discussions with key stakeholder leaders
9. Techniques and meaningful language changes that can transform criticisms into points of view and possible compromises
10. Electronic polling technologies for meetings and remote use on the web
11. Guidance on forming a public participation committee of interested public individuals
12. Creation of a "speaker's bureau" utilizing interested individuals, Chambers of Commerce, contractors, government officials, etc.

#### **Task 4 Public Workshop Facilitation**

The consultant will work with staff to organize and then facilitate the workshops described above, including preparing agendas, media presentations, leading discussion through the agenda and reaching positive outcomes to the maximum extent. The consultant is encouraged to create stimulating activities with artists, comedians or singers to include some fun and energy in these workshops.

### **SECTION 3 - PROPOSAL CONTENT**

#### **3.1 FORM**

Proposals and supporting materials shall be submitted in six (6) hardcopies and one (1) electronic copy suitable for evaluation. Legibility, clarity and completeness are essential. Proposals should provide assurance that the firm has the professional capability to satisfactorily complete all tasks as described in this RFP.

#### **3.2 PERSONNEL AND EXPERIENCE**

Describe the project contribution of each key person and approximate amount of time to be devoted to the project. Include a resume for each of the key personnel detailing their special qualifications applicable to the project. Especially identify personnel with special experience in development of general plan policies and programs. Describe the firm's qualifications in relationship to the required services. Summarize past projects of a similar nature that the consultant's firm has completed. If subcontractors are to be used, describe the methods that will be used to assure their cooperation and performance.

#### **3.3 COORDINATION**

Describe the process for maintaining a close working relationship between the consultant and the County project manager. Considerable merit will be placed on a relationship in which County staff is frequently and completely briefed on all work in process in a team approach.

#### **3.4 TASK TIMETABLE AND COST ESTIMATES**

The proposal shall contain the tasks required to complete the project with a completion target date for each task, to be coordinated with the LUTE work plan (attached). The consultant shall estimate the costs per task. The proposal shall include a table which specifies the following for each task: assigned personnel, number of hours to be spent, rate/hour, total cost.

The consultant shall prepare a detailed schedule with key milestones identified. The schedule shall, at a minimum, address these time frames:

	<u>Milestone</u>	<u>Time Frames</u>
a.	RFP sent out	Early October, 2009
b.	Proposals due	October 30, 2009
c.	Consultant selection	November 20, 2009
d.	Contract approved	December 15, 2009
e.	Start work	January 6, 2010
f.	Complete work by	December 30, 2011

### **3.5 DELIVERABLES**

The proposed deliverable document or other media or materials shall be listed with each proposed task.

### **3.6 SCOPE REVISIONS**

The consultant is encouraged to contribute creative ideas to this proposed scope of work. If the consultant identifies areas of concern or alternative methodologies not mentioned in this request, they should be described in the consultant's proposal and included in the cost estimate.

## **SECTION 4 - CRITERIA FOR EVALUATION OF PROPOSAL**

The County of San Luis Obispo will evaluate the proposals based on, but not limited to, the following criteria:

### **4.1 UNDERSTANDING OF THE PROPOSED SCOPE OF WORK**

- a. Demonstrated understanding of the project objectives
- b. Consultant's approach to accomplishing the scope of work
- c. Demonstrated knowledge of San Luis Obispo County issues

### **4.2 METHODS AND PROCEDURES**

- a. Consultant's general approach to evaluating the project
- b. Complete description of the techniques, procedures and methods to be utilized
- c. Adequacy and creativity of the proposal, especially regarding proposed methods for facilitating the flow of information between the public, stakeholders, Staff and the consultant, and for assuring meaningful participation by local residents and interested parties in the planning process

#### **4.3 MANAGEMENT, PERSONNEL AND EXPERIENCE**

- a. Qualifications of each participant and overall "skill-mix" for the firm
- b. Prior experience and quality of similar projects, especially in rural areas and communities
- c. Information obtained by contacting references listed by the consultant

#### **4.4 CONSULTATION AND COORDINATION**

- a. Procedures to be used to ensure close contact between consultant and the project team
- b. Demonstrated experience in working with community groups and local government
- c. Is there a "local presence" on the team? If all staff is located out of town, how can face-to-face communications take place?

#### **4.5 COST ESTIMATES**

- a. Timetable and costs for completing the project, with total and for each component.
- b. Are professionals and nonprofessionals used for the appropriate tasks in the proposal?
- c. Quality of product and extent of scope delivered for the consultant's fee
- d. Are the cost estimates reasonable for the work product proposed?

<b>Land Use and Transportation Element Update</b>		<b>Work Plan October 2, 2009</b>
<b>No.</b>	<b>Task / Sub-Tasks</b>	<b>Time Frame</b>
1.	<b>Project Scoping</b> 1.1. <b>Project Outline</b> – Write goals and a description of the project and its limits. 1.2. <b>Management Review</b> - Seek input and support from managers and other departments. 1.3. <b>Work Plan and Schedule</b> – Describe major tasks and their sub-tasks, and prepare a table with planned time frames. 1.4. <b>Staff coordination</b> – Inform staff of opportunities to participate and recruit according to interest and skills. 1.5. Identify discrete tasks for Current Planning 1.6. Send out public status report on LUTE with milestones	July 1, 2009 to August 31, 2009
2.	<b>Property Owner Requests Open</b> 2.1. Separate GPAs no longer allowed 90 days before start of update on January 15, 2010. Property owner request process starts. 2.2. Announce by Notice and bulletins by October 7, 2009.	October 18,2009
3.	<b>EIR Scoping Meeting</b> 3.1. Prepare draft scope first in consultation with Environmental Division; include Climate Action Plan (CAP)	November 2009
4.	<b>EIR NOP/Request for Proposals/Consultant Selection</b> 4.1. Scope and Request for Proposals; RFP should request suggestions on scope, process and needs for technical background information 4.2. RFP out in first week in October 4.3. Review proposals from RFP – consultant selection	September 2009 To December 15 2009
5.	<b>EIR Contract to Board</b> Write a contract for selected consultant review, then County Counsel for signature and send it with a report to the Board for approval.	December 15, 2009
	<b>Official Start of the Plan Update</b>	January 15, 2010
6.	<b>EIR Kick-Off Meeting</b> Discuss the consultant’s scope and any contract issues, project coordination and timeline.	January 2010
7.	<b>EIR setting (see also Tasks 12-15)</b> 7.1. Provide staff research and data to consultant, for example, the biological resource mapping; consultant to draft the Environmental Setting chapter of the EIR. 7.2. Consultant to identify constraints (i.e., most to least constrained areas).	January 2010 To May 2010

Land Use and Transportation Element Update		Work Plan October 2, 2009
No.	Task / Sub-Tasks	Time Frame
	<ul style="list-style-type: none"> <li>a. Identify existing conditions</li> <li>b. Identify areas of potentially significant impacts on water, infrastructure, etc. under the existing plan and under projected growth (see Tasks 15.1 and 15.2)</li> <li>c. Identify habitat types and constraints from bio-map provided by Planning and Building Department (see Tasks 14.5 – 14.8)</li> </ul>	
8.	<b>Outreach RFP / Consultant Selection</b> 8.1. Scope and Request for Proposals 8.2. Review proposals from RFP – consultant selection	August 2009 To December 2009
9.	<b>Outreach Contract to Board</b> Write a contract for selected consultant review, then County Counsel for signature and send it with a report to the Board for approval.	December 15, 2009
10.	<b>Outreach Kick-Off Meeting</b> Discuss the consultant’s scope and any contract issues, project coordination and timeline.	January 2010
11.	<b>Intensive Outreach, Survey &amp; Feedback</b> 11.1. Provide a series of announcements, background information, and progress reports in various media; include information on property owner GPA requests 11.2. Coordinate with outreach for the SCS and the CAP projects (essential). Use the SCS workshops to announce, for LUTE/CAP workshops/outreach; maybe even combine with the SCS workshops 11.3. Provide various feedback opportunities, such as online comments and a phone survey. 11.4. Emphasize reaching the <i>general</i> public 11.5. Outreach to cities, CSDs, advisory councils and bodies 11.6. Enlist CRP 411 class, for example, to present on need for planning for growth, impacts of conventional vs. Strategic Growth and constraints.	January 2010 To June 2010
12.	<b>Land Use and Transportation Capacity</b> <i>This task will inform the EIR setting</i> <i>An interdepartmental team will coordinate all transportation tasks</i> 12.1. Complete a Build-Out Model (coordinating with SLOCOG) to determine existing and alternative plan build-out. (alternative plans to be prepared by March 2010) 12.2. Map and classify roads per Circulation Maps 12.3. Complete a traffic model, energy use and air quality models to determine VMT, energy consumption and CO2 and other pollutants from existing and alternative plans, coordinating with SLOCOG and the CAP. 12.4. Coordinate with SLOCOG to use the model in Task 13.1 to filter physical constraints in Task 13.	July 2009 To November, 2009

Land Use and Transportation Element Update		Work Plan October 2, 2009
No.	Task / Sub-Tasks	Time Frame
13.	<p><b>Roads and Infrastructure Constraints &amp; Funding</b>  <i>This task will inform the EIR setting</i></p> <p><b>13.1.</b> Coordinate with SLOCOG to determine the road maintenance and improvements needed for traffic changes (VMT) associated with Build-Out of the existing and alternative plans (alternative plans to be prepared by March 2010).</p> <p><b>13.2.</b> Determine the funding needed to maintain and improve roads and infrastructure from Public Works and SLOCOG.</p> <p><b>13.3.</b> Model the funding needed for street and infrastructure improvements needed by the existing and alternative plans.</p> <p><b>13.4.</b> Work with Public Works and CSDs to determine the costs of improving distribution and providing supplemental water in rural areas that are least constrained for development (that could be areas for community expansion in the future).</p>	October 2009 To January 2010
14.	<p><b>Physical Constraint Mapping/Analysis</b>  <i>This task will inform the EIR setting and development suitability analysis. Staff will do some tasks and submit information to EIR consultant to complete and use in EIR setting.</i></p> <p><b>14.1.</b> Develop a GIS Constraints Model to use with the Build-Out Analysis (GIS maps that can be overlaid on areas of projected growth under existing and new alternative plans). This informs Task 15.2</p> <p><b>14.2.</b> Map physical constraints such as steep areas, flood plains, seismic and other hazard areas, and agricultural constraints (see soils maps in COSE).</p> <p><b>14.3.</b> Map areas of constrained water basins and distribution, using the RMS and resource capacity studies. Identify areas where supplemental water could be supplied.</p> <p><b>14.4.</b> Identify the major known habitat areas of plant and animal species, such as “hotspot” areas of endangered and threatened species, from previous reports <b>(consultant)</b>.</p> <p><b>14.5.</b> Identify habitat areas and connections between them that need protection and restoration to sustain long-term ecological health <b>(consultant)</b>.</p> <p><b>14.6.</b> Prepare a sensitivity analysis (most to least constrained) of the biological constraints for use in the Constraints Model <b>(consultant)</b></p> <p><b>14.7.</b> Identify areas of known development and potential conflicts between habitats, land use and transportation. <b>(consultant)</b>.</p>	October 2009 To March 2010
15.	<p><b>Trend Analysis – Growth Assessment</b>  <i>This task is to project the historical trends and identify needs:</i></p> <p><b>15.1.</b> Identify the trends from historical growth in rural and community development.</p> <p><b>15.2.</b> Determine the limits to, and opportunities for growth from the Capacity Analysis in Task 14.</p> <p><b>15.3.</b> Identify jobs/housing balance issues that affect projected trends, and include strategies in scenarios.</p> <p><b>15.4.</b> Identify the funding needed for infrastructure and streets, and the trends in recent funding limitations. Identify the relative costs of funding for projected growth and alternatives.</p>	November 2009 To March 2010

Land Use and Transportation Element Update		Work Plan October 2, 2009
No.	Task / Sub-Tasks	Time Frame
	<p>15.5. Identify areas where resources, infrastructure, economy and an improved jobs/housing balance will support strategic growth and reduce rural impacts, with guidance from the Draft Economic Development Strategies.</p> <p>15.6. Review the general plans of neighboring cities and counties.</p>	
16.	<p><b>Strategic Analysis</b></p> <p>16.1. Conduct a strategic analysis of strengths, weaknesses, opportunities and threats (SWOT) to inform the public participation in Task 21.</p> <p>16.2. Identify strategies and actions that can maximize implementation of SG, SCS, COSE and AG Element. Incorporate strategies to reduce greenhouse gasses (see "Model Policies for Greenhouse Gases in General Plans," www.capcoa.org)</p> <p>16.3. <b>Develop one or more scenarios</b> (prelim. plan alternatives) that implement Strategic Growth policies, COSE and AG/Open Space Plan, in opportunity areas without significant constraints and with mitigable constraints.</p>	December 2009 To March 2010
17.	<p><b>Format Technical Appendix &amp; write appendix chapters</b></p> <p>17.1. Include information similar to that in LUE Area Plan chapters.</p> <p>17.2. Include information from the infrastructure, constraints analyses, trends analysis, and funding research.</p> <p>17.3. Include the Climate Action Plan as an Appendix in Part I</p>	October 2009 To April 2010
18.	<p><b>Format Land Use Ordinance/Coastal Zone Land Use Ordinance</b>  <i>Current Planning staff to complete this task with oversight.</i></p> <p>18.1. Revise sections throughout that need re-referencing; reorganize Article 9, relocating standards to new, consolidated planning areas; revise language to identify the new plan and to replace or add to previous names; make other format/reference changes as needed. Consider re-titling Article 9, "Planning Area Standards" to avoid confusion with Community Plans (Part III)</p> <p>18.2. In the CZLUO, add a new Article 9 or similar, and relocate standards from the area plans.</p> <p>18.3. Identify standards to consolidate within Article 9, or even outside it in the LUO and/or CZLUO.</p> <p>18.4. Identify and write new rural standards that will implement new emphasis on Strategic Growth, sustainable resources, greenhouse gas and VMT reduction, infrastructure, economic vitality, etc. This will need to consider the analyses in Tasks 11 through 16</p> <p>18.5. Key aims for this task are streamlining, eliminating redundancies and outdated items, clear and consistent language.</p>	October 2009 To April 2010
19.	<p><b>Format Framework &amp; Area Plans, Parts I, II and III</b>  <i>Current Planning staff to assist with this task.</i></p> <p>19.1. Identify different approaches to engage readers, being more meaningful and condensing the plan. Research the streamlined plans of other jurisdictions for ideas.</p>	October 2009 To April 2010

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	<p><b>19.2.</b> Revise the chapters and sections to enable these approaches.</p> <p><b>19.3.</b> A new Resource Management section would address resources, countywide land use capacities for rural and urban growth</p> <p><b>19.4.</b> Develop a Technical Appendix to move content there.</p> <p><b>19.5.</b> Write a template of pilot chapters that capture the tone and language for drafting new text.</p> <p><b>19.6.</b> Format <b>Part I</b>, a revised Framework for Planning, Inland and Coastal, to address countywide (regional), general inter-relationships of land use and transportation concerning rural and urban development, at the regional, sub-regional, rural and community levels. See Task 27 for more.</p> <p><b>19.7.</b> Format <b>Part II</b>, the new Rural Plan, with new area plans (larger rural sub-areas):  Ch. 2: North County (Inland)  Ch. 3: Central County (Inland)  Ch. 4: South County (Inland)  Ch. 5: Coastal North (Coastal)  Ch. 6: Coastal South (Coastal)</p> <p><b>19.8.</b> Create <b>Part III</b>, the Community Plans, using (verbatim) sections of the existing area plans that apply to urban and village areas.</p>	
<b>20.</b>	<p><b>Format Planning Area Maps</b></p> <p><b>20.1.</b> Create draft planning area boundaries on parcel lines approximating watershed boundaries.</p> <p><b>20.2.</b> Use new planning area maps with modeling by calculating projected population and Build-Out.</p> <p><b>20.3.</b> Prepare graphics that show the areas in different media.</p>	October 2009 To March 2010
<b>21.</b>	<p><b>Public Workshops #1</b></p> <p><b>21.1.</b> Prepare a Visioning workshop that identifies the capacity issues and opportunity areas and scenarios, and potential costs.</p> <p><b>21.2.</b> Ask for vision statements for topics (see Task 22).  Conduct four or five workshops by proposed planning areas.</p>	February 2010
<b>22.</b>	<p><b>Vision and Strategies Based on Workshops</b></p> <p><b>22.1.</b> Write a format and text for a Sustainable Horizons Vision and Strategies, which incorporates long-term sustainability of resources, fundable facilities and services, economic vitality, and social improvements.</p> <p><b>22.2.</b> Include concepts for maintaining key resources and planning with them (capacity-based planning), accommodating economic growth within resources, and meeting the needs of previously under-served populations.</p> <p><b>22.3.</b> Write vision statements and goals that reflect the SG principles, Agriculture Element, COSE and CAP strategies, etc., and introduce the following:</p> <ul style="list-style-type: none"> <li><b>a.</b> Regional Progress – new partnerships for economic, social and environmental progress</li> <li><b>b.</b> Rural Heritage – Integrated rural area vision for agriculture, residential living and</li> </ul>	February and March 2010

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	preserved natural environment	
23.	<b>Internal Charrette</b> 23.1. Conduct an internal staff & agency charrette to engage and create comprehensive plan alternatives that derive from the scenarios and analysis.	March 2010
24.	<b>Develop Plan Alternatives</b> 24.1. Write plan alternatives that reflect the charrette and scenarios. 24.2. Review them with the physical constraints, cost analyses and policy guidance from SG principles, COSE, CAP, SCS, Ag. Element, etc. 24.3. Incorporate property owner GPA requests into the applicable alternatives 24.4. Distribute them for public review and comment.	March 2010
25.	<b>Public Workshops #2</b> 25.1. Show the vision and strategies prepared following Workshops #1 per Task 22. 25.2. Prepare and conduct planning area workshops that review the plan alternatives. 25.3. Provide for feedback that informs which alternatives are preferable.	April 2010
26.	<b>Refine Plan Alternatives</b> 26.1. Write plan alternatives that carry forward feedback from the workshops and other sources. 26.2. Review them with other policies and ensure consistency.	May 2010
27.	<b>Public Review Draft Plan Preparation</b> 27.1. Draft countywide and rural area policies and revised LUO standards to identify how scenarios might be achieved. 27.2. For the rural sub-areas, identify what is needed to achieve the vision statements and other County goals, such as Strategic Growth, COSE, CAP and SCS, and identify issues and costs. 27.3. Prepare GIS & text scenarios that identify issues, costs in 22.2. 27.4. Coordinate with SLOCOG SCS outcomes. 27.5. Incorporate CAP policies and strategies on rural and urban land use and transportation into Part I (complete CAP will be an appendix to Part I). <b>27.6. Part I: Countywide Plan (Framework, Coastal and Inland)</b> a. Describe/illustrate the challenges for the future, e.g., growth/resource trends, buildout of communities, infrastructure needs, etc. b. Address countywide, rural and urban inter-relationships of land use and transportation in each chapter at a general level c. Chapter topics similar to existing Framework for Planning, with major changes: 1) Vision and setting statements (vision to 2030 and beyond) 2) Strategic analyses 3) Resource- and capacity-based planning**	May 2010 To September 2010

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	<ul style="list-style-type: none"> <li>4) Infrastructure planning and CIP programming**</li> <li>5) Land use strategies that help implement strategic growth policies, Sustainable Communities Strategy (SCS), Climate Action Plan (CAP), COSE, Housing Element, and Economic Development Strategy; include CAP land use and transportation policies and strategies that affect both rural areas and communities; full CAP to go in Appendix</li> <li>6) Strategies for high-value transportation improvements that coordinate with strategic growth policies and SCS</li> <li>7) Expanded implementation programs</li> <li>8) Possible changes to definitions and density ranges of land use categories</li> </ul> <p><b>27.7. Part II: Rural Plan</b> (separate documents for Coastal and Inland)</p> <ul style="list-style-type: none"> <li>a. Chapter 1: Rural settlement patterns and growth, agriculture, resources: <ul style="list-style-type: none"> <li>1) Overview, issues and vision for the rural areas, for land use and transportation; overall settlement patterns in rural areas</li> <li>2) Projections of rural uses of resources</li> <li>3) Rural policies and strategies: protect agriculture and natural areas, establish community separation and greenbelts, locate urban expansion in least constrained areas, identify rural centers that provide basic services for rural residential settlements and perhaps recognize those areas as villages</li> </ul> </li> <li>b. Ch. 2: North County (Inland); Coastal North (Coastal)</li> <li>c. Ch. 3: Central County (Inland); Coastal South (Coastal)</li> <li>d. Ch. 4: South County</li> </ul> <p><b>27.8. Part III: Community Plans</b> – new document</p> <ul style="list-style-type: none"> <li>a. Community plans for urban and village areas to be reformatted with the chapter format in the Area Plans.</li> <li>b. Content to be moved from Area Plan chapters to new Community Plan chapters. Total of 26 plans in Part III: <ul style="list-style-type: none"> <li>1) 11 urban plans (six Inland, five Coastal)</li> <li>2) 15 village plans ( 13 Inland, two Coastal )</li> </ul> </li> <li>c. Text changes to be limited to references only. Substantive text and map changes are not part of this update.</li> </ul> <p><b>27.9. Part IV: LUC/Trans/CD Maps</b> (see Task 20)</p> <ul style="list-style-type: none"> <li>a. Rural land use and combining designation maps to be revised with Part I and II</li> <li>b. Map changes will not include major rezonings needed to implement Ag. Element land use maps</li> <li>c. Community maps to be remain unchanged with Part III</li> </ul>	
28.	<p><b>EIR Project Description - Start Draft EIR</b></p> <p><b>28.1.</b> Complete a project description that includes a plan outline, the primary plan alternative and perhaps two other secondary plan alternatives (modifications of the primary one).</p> <p><b>28.2.</b> Write these alternatives in the template plan format as a preliminary draft.</p> <p><b>28.3.</b> Write a Notice of Preparation with the project description as the basis for an EIR.</p> <p><b>28.4.</b> Notify the consultant to start preparation of an EIR based on the project description.</p> <p><b>28.5.</b> The EIR project description is to include the CAP (which will apply to rural and</p>	June 2010 To July 2010

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	urban areas), which will be evaluated as part of the EIR.	
<b>29.</b>	<b>Sustainable Communities Strategy – SLOCOG</b> <b>29.1</b> Coordinate with SLOCOG and other agencies and cities <b>29.2</b> Support data and modeling, planning and process.	
<b>30.</b>	<b>Climate Action Plan</b> <b>30.1.</b> Coordinate plan preparation and alternatives with the Climate Action Plan. <b>30.2.</b> Include preliminary CAP findings and recommendations as available for the Vision, Strategies and Workshops. <b>30.3.</b> Release draft CAP at end of August together with Draft public review draft LUTE; incorporate CAP policies (and possibly strategies) on land use and transportation into the draft plan and include full CAP in Appendix of Part I of LUTE	October 2009 To September 2010
<b>31.</b>	<b>Property Owner Requests End</b> Close 45 days prior to release of Public Review Draft plan.	July 15, 2010
<b>32.</b>	<b>Public Review Draft Plan (PRD) &amp; Release</b> Consists of Part I (inland and coastal), Part II and reformatted/revise LUO (planning area) standards <b>32.1.</b> Prepare a Preliminary Draft Plan for administrative and EIR review for significance of impacts. <b>32.2.</b> Complete a Public Review Draft Plan that includes the Vision and Strategies from the previous analyses, workshops and public feedback. <b>32.3.</b> Public Review Draft will emphasize policies that avoid significant environmental impacts where feasible as a first priority. Use policies that derive from mitigation measures recommended by the EIR consultant, as a secondary priority. <b>32.4.</b> Analyze individual owner GPA requests and prepare recommendations in a report <b>32.5.</b> Release the Public Review Draft Plan to as wide a public as feasible, using various media.	May 2010 To September 2010
<b>33.</b>	<b>PRD Review:</b> Workshops, CACs, others review (plan only)	September and October 2010
<b>34.</b>	<b>Draft EIR Preparation &amp; Release</b> <b>34.1.</b> Evaluate individual owner GPA requests as part of the evaluation of project alternatives <b>34.2.</b> Release Draft EIR beginning January 2011 together with Public Hearing Draft Plan.	July 2010 To January 2011

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<b>35.</b>	<b>Prepare/Publish Public Hearing Draft Plan with DEIR</b> Release Draft Plan beginning January 2011 Draft Plan to consist of Part I (inland and coastal), Part II, reformatted Part III (Community Plans), reformatted/ revised LUO (planning area) standards, and reformatted CZLUO with planning area standards (no changes to standards)	November 2010 To January 2011
<b>36.</b>	<b>Public Review of Hearing Draft Plan and DEIR</b> 45-day EIR comment period closes end of February	January, February and March 2011
<b>37.</b>	<b>Response to Comments on DEIR</b> Release responses, mitigation measures and alternatives; documents that contain the information that would be contained in a FEIR without calling it such	March and April 2011
<b>38.</b>	<b>PC Notice and Staff Report</b>	March 2011
<b>39.</b>	<b>Planning Commission Hearings (9 + study session)</b>	April To September 2011
<b>40.</b>	<b>Planning Commission-Recommended Plan and Revisions to DEIR</b> (mid-September 2011)	August and September 2011
<b>41.</b>	<b>Public Review of PC Plan and DEIR Revisions</b>	September and October 2011
<b>42.</b>	<b>Board of Supervisor Hearings (4)</b> Decision on Final Plan and Final EIR	October, November and December 2011
<b>43.</b>	<b>Prepare and distribute Final Plans</b> Post-approval work, such as mapping changes and submittal of revised Coastal Framework and CZLUO to Coastal Commission	December to February 2012

