



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, Director

Helen McCann, Department Administrator

## REQUEST FOR PROPOSAL PS- #1131 INFILL SUBDIVISION AND DEVELOPMENT STANDARDS

June 14, 2011

The County of San Luis Obispo (County) is currently soliciting proposals for professional services for Infill Subdivision and Development Standards..

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 reserves the right to reject any and all proposals and to waive any irregularity or informality in any proposal or in the Request for Proposal process, as long as, in the judgment of the County, such action will not negate fair competition and will permit proper comparative evaluation of the proposals submitted.

This Request for Proposal is posted on the County's Purchasing website at [http://www.slocounty.ca.gov/GSA/Purchasing/Current\\_Formal\\_Bids\\_and\\_Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current_Formal_Bids_and_Proposals.htm). Any changes, additions, or deletions to this Request for Proposal will be in the form of written addenda issued by the County. Any addenda will be posted on the website. Prospective proposers must check the website for addenda or other relevant new information during the response period. The County is not responsible for the failure of any prospective proposer to receive such addenda. All addenda so issued shall become a part of this Request for Proposal.

If your firm is interested and qualified, please submit five (5) hard copies and one (1) electronic copy (on CD or DVD) of your proposal on July 21, 2011 by 3:00 p.m. to:

County of San Luis Obispo  
Debbie Belt, GSA - 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 James (Jamie) Lopes at (805) 781-5975.

All questions pertaining to the content of this Request for Proposal must be made in writing via e-mail to James Lopes at: [jlopes@co.slo.ca.us](mailto:jlopes@co.slo.ca.us). All questions will receive a response within two (2) business days. The question and its response will be posted (anonymously) on the County's Purchasing web site located at: [http://www.slocounty.ca.gov/GSA/Purchasing/Current\\_Formal\\_Bids\\_and\\_Proposals.htm](http://www.slocounty.ca.gov/GSA/Purchasing/Current_Formal_Bids_and_Proposals.htm). The County reserves the right to determine the appropriateness of comments/questions that will be posted on the website.

DEBBIE BELT  
Buyer – GSA - Purchasing  
[dbelt@co.slo.ca.us](mailto:dbelt@co.slo.ca.us)

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS**

**LOCAL VENDOR PREFERENCE**

The County has established a local vendor preference. When quality, service, and other relevant factors are equal, responses to Requests for Proposals will be evaluated with a 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 preference will be approved as such when, 1) The vendor conducts business in a fully staffed office with a physical address within the County of San Luis Obispo; 2) The vendor holds a valid business license issued by the County or a city within the County; and 3) The vendor has conducted business at the local address for not less than six (6) months prior to the due date of this Request for Proposal..

Proposals received in response to this Request for Proposal will be evaluated by the Selection Committee considering the local vendor preference described above when quality, service and other relevant factors are equal. 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.

	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: \_\_\_\_\_

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****PROPOSAL SUBMITTAL AND SELECTION**

1. All proposals, consisting of five (5) hard copies and one (1) electronic copy (on CD or DVD) must be received by mail, recognized carrier, or hand delivered no later than 3:00 p.m. on July 21, 2011. Late proposals will not be considered and will be returned, unopened.
2. All correspondence should be directed to:

San Luis Obispo County  
General Services Agency  
1087 Santa Rosa Street  
San Luis Obispo, CA 93408  
ATTENTION: DEBBIE BELT  
Telephone: (805) 781-5903
3. All costs incurred in the preparation and submission of proposals and related documentation 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 impartial Selection Committee using an approved County procedure for awarding professional contracts. Selection will be made on the basis of the proposals as submitted, although the County reserves the right to interview applicants as part of the selection process. The proceedings of the Selection Committee are confidential, and members of the Selection Committee are not to be contacted by the proposers.
6. This Request for Proposal does not constitute an offer of employment or to contract for services.
7. The County reserves the option to accept or reject any or all proposals, wholly or in part, received by reason of this request, and make more than one award, or no award, as the best interests of the County may appear.
8. All documents submitted to the County in response to this Request for Proposal will become the exclusive property of the County and may be returned to the proposer or kept by the County, in the County's sole discretion.
9. All proposals shall remain firm for ninety (90) 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. Any contract awarded pursuant to this Request for Proposal will incorporate the requirements and specifications contained in this Request for Proposal. All information presented in a proposer's proposal will be considered binding upon selection of the successful proposer, unless otherwise modified and agreed to by the County during subsequent negotiations.
12. Under the provisions of the California Public Records Act (the "Act"), Government Code section 6252 et seq., all "public records" (as defined in the Act) of a local agency, such as the County, must be available for inspection and copying upon the request of any person. Under

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the Act, the County may be obligated to provide a copy of any and all responses to this Request for Proposal, if such requests are made after the contract is awarded. One exception to this required disclosure is information which fits within the definition of a confidential trade secret [Government Code section 6254(k)] or contains other technical, financial or other data whose public disclosure could cause injury to the proposer's competitive position. If any proposer believes that information contained in its response to this Request for Proposal should be protected from disclosure, the proposer MUST specifically identify the pages of the response that contains the information by properly marking the applicable pages and inserting the following notice in the front of its response:

***NOTICE:*** *The data on pages \_ of this response identified by an asterisk (\*) contain technical or financial information, which are trade secrets, or information for which disclosure would result in substantial injury to the proposer's competitive position. Proposer requests that such data be used only for the evaluation of the response, but understands that the disclosure will be limited to the extent the County considers proper under the law. If an agreement is entered into with the proposer, the County shall have the right to use or disclose the data as provided in the agreement, unless otherwise obligated by law.*

The County will not honor any attempt by proposer to designate its entire proposal as proprietary. If there is any dispute, lawsuit, claim or demand as to whether information within the response to the Request for Proposal is protected from disclosure under the Act, proposer shall indemnify, defend, and hold harmless, the County arising out of such dispute, lawsuit, claim or demand.

13. An electronic copy of your proposal must be included. This electronic copy should include all documents being submitted combined into one Adobe Acrobat (pdf) file on a CD, using this convention for the file name: FIRM NAME + RFP NUMBER

*Example:* Your firm, Acme Inc., is responding to RFP PS-#1101. Your Adobe Acrobat (pdf) file would be named: **Acme 1101**

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****PROPOSAL FORMAT**

A qualifying proposal must address all of the following points and shall be in the format outlined in this section:

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. See the insurance requirements detailed on page 7.
  - 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.

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****d. Indemnification**

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.

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****SAN LUIS OBISPO COUNTY INSURANCE REQUIREMENTS**

Consultant, at its sole cost and expense, shall purchase and maintain the insurance policies set forth below on all of its operations under this Agreement. Such policies shall be maintained for the full term of this Agreement and the related warranty period (if applicable) and shall provide products/completed operations coverage for four (4) years following completion of Consultant's work under this Agreement and acceptance by the County. Any failure to comply with reporting provision(s) of the policies referred to above shall not affect coverage provided to the County, its officers, employees, volunteers and agents. For purposes of the insurance policies required hereunder, the term "County" shall include officers, employees, volunteers and agents of the County of San Luis Obispo, California, individually or collectively.

**1. MINIMUM SCOPE AND LIMITS OF REQUIRED INSURANCE POLICIES**

The following policies shall be maintained with insurers authorized to do business in the State of California and shall be issued under forms of policies satisfactory to the County:

**a. COMMERCIAL GENERAL LIABILITY INSURANCE POLICY ("CGL")**

Policy shall include coverage at least as broad as set forth in Insurance Services Office (herein "ISO") Commercial General Liability coverage. (Occurrence Form CG 0001) with policy limits not less than the following:

\$1,000,000 each occurrence (combined single limit);  
\$1,000,000 for personal injury liability;  
\$1,000,000 aggregate for products-completed operations; and,  
\$1,000,000 general aggregate.

The general aggregate limits shall apply separately to Consultant's work under this Agreement.

**b. BUSINESS AUTOMOBILE LIABILITY POLICY ("BAL")**

Policy shall include coverage at least as broad as set forth in Insurance Services Office Business Automobile Liability Coverage, Code 1 "Any Auto" (Form CA 0001). This policy shall include a minimum combined single limit of not less than One-million (\$1,000,000) dollars for each accident, for bodily injury and/or property damage. Such policy shall be applicable to vehicles used in pursuit of any of the activities associated with this Agreement. Consultant shall not provide a Comprehensive Automobile Liability policy which specifically lists scheduled vehicles without the express written consent of County.

**c. WORKERS' COMPENSATION AND EMPLOYERS' LIABILITY INSURANCE POLICY ("WC/EL")**

This policy shall include at least the following coverages and policy limits:

1. Workers' Compensation insurance as required by the laws of the State of California; and
2. Employer's Liability Insurance Coverage B with coverage amounts not less than one million (\$1,000,000) dollars each accident/Bodily Injury (herein "BI"); one million (\$1,000,000) dollars policy limit BI by disease; and, one million (\$1,000,000) dollars each employee BI by disease.

**2. DEDUCTIBLES AND SELF-INSURANCE RETENTIONS**

Any deductibles and/or self-insured retentions which apply to any of the insurance policies referred to above shall be declared in writing by Consultant and approved by the County before work is begun pursuant to this Agreement. At the option of the County, Consultant shall either reduce or eliminate such deductibles or self-insured retentions as respect the County, its officers, employees, volunteers and agents, or shall provide a financial guarantee satisfactory to the County guaranteeing payment of losses and related investigations, claim administration, and/or defense expenses.

**3. ENDORSEMENTS**

All of the following clauses and endorsements, or similar provisions, are required to be made a part of insurance policies indicated in parentheses below:

- a. A "Cross Liability", "Severability of Interest" or "Separation of Insured" clause (CGL & BAL);
- b. The County of San Luis Obispo, its officers, employees, volunteers and agents are hereby added as additional insured with respect to all liabilities arising out of Consultant's performance of work under this Agreement (CGL & BAL);
- c. If the insurance policy covers an "accident" basis, it must be changed to "occurrence" (CGL & BAL);
- d. This policy shall be considered primary insurance with respect to any other valid and collectible insurance County may possess, including any self-insured retention County may have, and any other insurance County does possess shall be considered excess insurance only and shall not be called upon to contribute to this insurance (CGL, BAL & PL);
- e. No cancellation or non-renewal of this policy, or reduction of coverage afforded under the policy, shall be effective until written notice has been given at least thirty (30) days prior to the effective date of such reduction or cancellation to County at the address set forth below (CGL, BAL, WC/EL & PL);
- f. Consultant and its insurers shall agree to waive all rights of subrogation against the County, its officers, employees, volunteers and agents for any loss arising under this Agreement (CGL); and
- g. Deductibles and self-insured retentions must be declared (All Policies).

**4. ABSENCE OF INSURANCE COVERAGE**

County may direct Consultant to immediately cease all activities with respect to this Agreement if it determines that Consultant fails to carry, in full force and effect, all insurance policies with coverages at or above the limits specified in this Agreement. Any delays or expense caused due to stopping of work and change of insurance shall be considered Consultant's delay and expense. At the County's discretion, under conditions of lapse, the County may purchase appropriate insurance and charge all costs related to such policy to Consultant.

**5. PROOF OF INSURANCE COVERAGE AND COVERAGE VERIFICATION**

Prior to commencement of work under this Agreement, and annually thereafter for the term of this Agreement, Consultant, or each of Consultant's insurance brokers or companies, shall provide County a current copy of a Certificate of Insurance, on an Accord or similar form, which includes complete policy coverage verification, as evidence of the stipulated coverages. All of the insurance companies providing insurance for Consultant shall have, and provide evidence of, a Best Rating Service rate of A VI or above. The Certificate of Insurance and coverage verification and all other notices related to cancellation or non-renewal shall be mailed to: GENERAL SERVICES AGENCY, ATTN: DEBBIE BELT, 1087 SANTA ROSA ST, SAN LUIS OBISPO, CA 93408

# Scope of Work

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## Infill Subdivision and Development Standards

### 1. Project Description

The County Board of Supervisors has adopted “Strategic Growth” principles and policies that direct growth to strategically planned urban communities with adequate resources. In addition to County policies, State statutes require more attention to better land use and transportation relationships that will reduce greenhouse gases and vehicle miles traveled. To achieve strategically planned communities, higher residential densities need to be planned and developed close to public transit and daily destinations. However, public perceptions are frequently negative about higher density being out of context with neighborhood history, image and character. Other concerns often are that existing neighborhoods will be impacted by abrupt changes in scale and massing, heights, privacy, noise, parking and traffic patterns, among others.

Research and case studies indicate that compatible higher density projects can be developed within smaller scale neighborhoods. Other research shows that moderate densities and building intensities can enhance community character and livability. This project is intended to revise County ordinances to guide and promote moderate-density infill and mixed-use residential development within residential and commercial zoning. The project will result in illustrated standards that clarify how to achieve Strategic Growth policies with a variety of housing development types, which will be compatible with existing neighboring development and enhance community character and livability.

This project will create **Infill Subdivision and Development Standards** for compatible and diverse infill and mixed-use projects:

- The consultant will assist staff to revise and introduce regulations that promote urban infill and revise or eliminate regulations that act to prevent or discourage it.
- The amendments will adjust parcel size ranges and building intensities in the General Plan to encourage diverse lot sizes and neighbor-sensitive infill development.
- Standards will guide compact lot sizes and patterns, varying lot sizes, housing types and housing costs within subdivisions, to address affordable and neighbor-friendly design that integrates projects with nearby development character.
- Standards will also add guidance for horizontal and vertical mixed use.
- Ordinance modifications, partial fee waivers, streamlined processing and other incentives to encourage multi-family and mixed use projects.
- Design guidance will be added to the Countywide Design Guidelines for multi-family and mixed-use site planning and building design.

The project will edit previously prepared **Illustrative Design Models** to demonstrate before- and after-development utilizing draft standards within multi-family and mixed-use Target Development Areas. These areas are identified in the Preliminary Sustainable Communities Strategy, which was prepared by the San Luis Obispo Council of Governments. These digital models will allow communities and developers to view potential development projects in local settings to show how the specific new standards integrate higher density development with its neighbors and create diverse housing and higher densities, especially near transit. The models will follow and add to a set of Illustrative Design Models that will have been prepared separately to convey similar concepts of implementing Strategic Growth.

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## 2. Project Tasks

The following sections comprise the project, which shall be under the supervision of the Department of Planning and Building.

### A. Research and Analysis

1. Prepare a **Research and Analysis report** concerning the obstacles or impediments to achieving the stated vision and intent of the County Strategic Growth principles and policies in regard to more affordable, higher density housing types than currently exist:
  - 1.1. Identify from research sources the most effective design parameters and solutions to attracting investment in development according to Strategic Growth policies within existing neighborhoods (infill).
  - 1.2. Recognize and incorporate the subjects and findings of the Community Character and Compatibility reports to be prepared for the Illustrative Design Models project.
  - 1.3. Analyze existing County ordinances from this research for any gaps, impediments or misdirection that may obstruct or discourage higher density infill development, and identify potential direction and guidance that would fill in policy gaps or replace current standards.
  - 1.4. Analyze and pictorially document existing physical conditions within the County unincorporated urban areas that pose obstacles to urban infill, such as largely developed multi-family zoning or small infill sites. Document and describe the design aspects of community character that are typical and those that are specifically local.
  - 1.5. Document from workshops and/or media the typical, local pride of ownership in community character (such as historical buildings) and concerns about erosion of community character by new development. Identify the types of development that are typically preferred in County urban areas at this time, and the public perceptions that limit public acceptance of higher density and mixed uses.
  - 1.6. Prepare the report as the foundation document that will guide revisions to Framework for Planning of the Land Use Element, the County Real Property Division Ordinance (Title 21) and the Inland and Coastal Zone Land Use Ordinances (Titles 22 and 23).
  - 1.7. Coordinate the report with, and note differences with the **Illustrative Design Models** project to be conducted earlier.
  - 1.8. Prepare an executive summary in text and in a digital format to present as a video slide show live and on internet media.

### B. Ordinance Revisions

1. Prepare an **Ordinance Review report** that identifies specific sections that should be changed, deleted or added with specific suggested policies and standards, including, at a minimum:
  - 1.1. Regulations that compel or allow higher density projects to potentially be incompatible with nearby development, such as setbacks, heights, parking, fencing or design.
  - 1.2. Regulations that hinder or preclude infill and Strategic Growth.
  - 1.3. The omission of regulations or guidance that leaves silent the issue of compatibility and the potential design options that could best address it.
  - 1.4. Within a separate Coastal Zone section, any Local Coastal Plan policies or regulations that would preclude or discourage ordinance revisions to encourage infill development.

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- 1.5. Potential regulations (including site and architectural design standards) that promote rather than hinder urban infill, mixed housing types and higher densities.
- 1.6. Adjustments to parcel size ranges and building intensities in the General Plan Land Use Element to encourage smaller and diverse lot sizes for specific housing types.
- 1.7. Standards that will guide or require compact lot sizes and patterns; varying lot sizes, housing types and housing costs within subdivisions; and neighbor-friendly design to integrate projects with nearby development character.
- 1.8. Standards to guide horizontal and vertical mixed use projects.
- 1.9. Ordinance modifications, partial fee waivers, streamlined processing and other incentives to encourage multi-family and mixed use projects.
- 1.10. Textual and illustrated proposals for new regulations (including a potential illustrated form-based format) for a variety of housing types that would be suitable to respond to the Research and Analysis report, such as those listed in Table 1.

**Table 1. Potential Projects**

	Type	Applicable Zones	Minimum Units per Acre
1	Single family detached planned development	Residential Single Family (RSF)	10
2	Multi-family planned development	Residential Multi Family (RMF)	15
3	Multi-family condominiums	Residential Multi Family (RMF)	20
4	Mixed-use residential/commercial	RSF; RMF; Commercial Retail (CR); Office & Professional (O&P); Commercial Service (CS)	10
5	Mixed-use residential/commercial	RSF; RMF; CR; O&P; CS	20

- 1.11. Prepare an executive summary in text and in a digital format to present as a video slide show live and on internet media.
  - 1.12. Revise the Illustrative Design Model of a Strategic Growth neighborhood (preparation pending grant approval) to include the major development types addressed by the ordinance revisions, such as those in Table 1, in computerized “walk-through” technology.
  - 1.13. Present the Ordinance Review report to two public workshops in north and south county for public responses, utilizing preference survey media, and to the Planning Commission and to the Board of Supervisors in study sessions to obtain input from these bodies for further consideration. Staff will present the report to community advisory councils and stakeholder groups.
2. Prepare a **Public Review Draft of Ordinance Revisions** that includes the following:
- 2.1. An executive summary of the proposed revisions, with explanations that refer to the prior reports and simple-to-understand text and graphics. A PowerPoint video that narrates the executive summary shall also be prepared for staff presentations and Internet media such as website and YouTube presentations.
  - 2.2. Prepare corresponding amendments within the Coastal Zone ordinances that are consistent with Local Coastal Plan policies and the coastal setting.
  - 2.3. Ordinance revisions that respond to the list of items required for the Ordinance Review report in Task B.1. The revisions are to be prepared in legislative editing. They will be codified and introduce new

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sections, move existing ones and delete unsuitable sections, within the existing 8.5 x 11 inch portrait format.

- 2.4. Ordinance revisions in a preliminary "adopted" format without legislative editing, to show the revisions clearly.
  - 2.5. Creative use of the existing page format to include illustrations (such as on facing pages) that guide understanding of the regulations.
3. Assist preparation of the environmental determination conducted according to the California Environmental Quality Act by providing clarifying information, building creative mitigation measures into the ordinance revisions, and identifying alternative ordinance revisions (project alternatives) in the case of an environmental impact report. Staff will be responsible for preparation of the environmental determination.
  4. Prepare a **Public Hearing Draft of Ordinance Revisions** that responds to and incorporates the environmental determination, public and stakeholder comments and staff suggestions.
    - 4.1. Prepare an executive summary of the proposed revisions from the Public Review Draft. A PowerPoint video that narrates the executive summary shall also be prepared for staff presentations and Internet media such as website and YouTube presentations.

**C. Countywide Design Guidelines**

1. To supplement ordinance standards, add a section to the **Countywide Design Guidelines** on multi-family and mixed use development guidelines illustrated with drawings and/or photographs, to address specific detailed measures to create at least the following in project designs:
  - 1.1. Compatible residential interfaces with neighboring residential and commercial uses to protect privacy and livability for residents, for example, through window placement, utility and operations centers, and orientation of entrances and noise sources
  - 1.2. Measures to correlate new development with surrounding heights, roof treatments, design motifs, decoration and details in existing development
  - 1.3. Measures to create distinctive character and identity for the commercial and residential facades and areas in mixed use projects
  - 1.4. Scaling, massing and other measures that enhance human interaction and experience on the public sidewalk and in private/public courtyards and other spaces

**3. Project Meetings**

1. A kick-off meeting will be held with the consultant and the County team to review the project scope, budget and deliverables; discuss team communication processes; and discuss data sources and sharing. The Planning and Building Department will form a project team to work with the consultant.
2. Besides the "kick off" meeting, the consultant will be available to meet with one or more of the County or other agency staff when given advance notice through the Planning and Building Department project manager. The cost estimate shall include the "kick off" meeting and at least 12 other meetings or teleconferences.

**4. Public Meetings**

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1. The consultant shall prepare and present two public workshops with Planning and Building Department staff in north and south county, as required in Task B.1.11.
2. The consultant shall include costs to attend one Planning Commission study session, one study session at the Board of Supervisors, six (6) public hearings at Planning Commission, and three (3) public hearings at the Board of Supervisors. The consultant shall be prepared to make presentations, respond to questions and/or participate in an advisory capacity during meetings/hearings. The costs for attendance at the public meetings/hearings shall be itemized and are to be considered an option to be exercised by the County.

## 5. Deliverables

Deliverables shall include the following reports in a consistent format to also form a single document or set of documents and programs:

1. **Research and Analysis Report:** Existing conditions and preferences in Task 2.A.1
2. **Ordinance Review Report:** Analysis, solutions and images in Task 2.B.1
3. **Public Review Draft Ordinance Revisions:** Draft ordinance in Task 2.B.2
4. **Public Hearing Draft Ordinance Revisions:** Revised draft ordinance in Task 2.B.4
5. **Countywide Design Guidelines Revisions:** Sections in Task 2.C
6. **Graphics, posters, videos in accessible software:** Media in Tasks 2.A.1.8; 2.B.1.9; 2.B.2.1; and 2.B.4.1
7. **Illustrative Design Models:** Video and real-time simulations of sample projects that illustrate the proposed ordinance revisions, in Task 2.B.1.10
8. **Monthly Progress Reports:** Brief monthly reports that document progress on the tasks and identify any issues that need special attention.

Each deliverable report shall include one (1) electronic copy (in Word and other programs as appropriate), and five hard copies.

The format for all text documents, tables, charts, and illustrations shall be 8½" x 11" vertical. Format design shall be agreed upon with County staff. If oversize inclusions are necessary, they will be 11" x 17". Document covers for all related documents shall be coordinated so they appear as a "set." All efforts shall be made to maintain the size of the project to no more than 200 pages. As much of the technical information as possible shall be placed in appendices. Duplication of information in multiple locations shall be avoided as much as possible. All administrative drafts, drafts, and final documents shall be two-sided, black ink, on recycled stock paper (white or light color).

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****6. Proposal Content****A. Form**

Proposals and supporting materials shall be submitted in bound copies 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 Section 2 of this Scope of Work.

**B. Personnel and Experience**

If subcontractors are to be used, describe the methods that will be used to assure their cooperation and performance. 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. 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.

**C. Coordination**

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

**D. Proposed Scope of Work**

The consultant will provide a proposed scope of work with refinements to this initial scope, which reflects the consultant's understanding and expertise.

**E. Task Timetable and Cost Estimates**

The proposal shall contain the tasks required to complete the project with a time frame and cost estimate for each task.

**F. Objectivity**

All reports and plans are to be an independent, objective, and unbiased work product. Proposals shall certify that the consultant, principals, and subcontractors (if used) have the capacity to submit neutral and unbiased work products.

**7. Criteria for Evaluation of Proposal**

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

**Understanding of the Scope of Work to be performed**

- A. Demonstrated understanding of the project objectives.
- B. Consultant's approach to accomplishing the scope of work.
- C. Timetable and costs for completing the project.

**Consultant's Methods and Procedures to be used**

- A. Consultant's general approach to evaluating the issues.
- B. Complete description of the procedures and analytical methods to be utilized.

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****Management, Personnel and Experience**

- A. Qualifications of each participant and overall "skill mix" for the firm.
- B. Experience and performance on projects of a similar nature.
- C. Information obtained by contacting references listed by the consultant.

**Consultant's Consultation and Coordination with County of San Luis Obispo**

- A. Procedures to be used to ensure close contact between consultant and the project coordinator.
- B. Demonstrated experience in working with local government.

**Cost Estimates**

- A. Are professionals and nonprofessionals used for the appropriate tasks in the proposal?
- B. What quality of product will be delivered for the consultant's fee?
- C. Are the cost estimates reasonable for the work product proposed?

**8. Background Information**

The following materials and documents contain information and standards applicable to the project:

1. Attachment 1: Strategic Growth Principles, Policies and Implementing Actions (excerpts)
2. Framework for Planning of the Land Use and Circulation Elements - Inland and Coastal Zone
3. Title 21 – Real Property Division Ordinance
4. Title 22 - Land Use Ordinance – Inland
5. Title 23 - Land Use Ordinance - Coastal Zone
6. Countywide Design Guidelines
7. Excerpt from November 24, 2009 Board of Supervisors authorization staff report

## **Attachment 1**

### **Strategic Growth Principles, Policies and Implementing Actions (Excerpts)**

**From Framework for Planning – Inland Area  
County of San Luis Obispo**

**(Similar policies from the Coastal Zone Framework for Planning  
apply to coastal communities)**

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(Essential supporting strategies for this project are highlighted in gray)

**CHAPTER 1: INTRODUCTION TO THE LAND USE ELEMENT (EXCERPTS)****F. PLANNING PRINCIPLES, POLICIES AND IMPLEMENTING STRATEGIES**

The following principles and policies reflect the Board of Supervisors' adoption of "Smart Growth Principles." The purpose of these principles and policies is to better define and focus the county's proactive planning approach and balance environmental, economic and social equity concerns. This approach includes strategic planning, which considers constraints and opportunities and identifies realistic, short-term strategies that will achieve longer-term goals. Accordingly, the combination of smart growth and strategic planning is considered "strategic growth," which seeks cooperation among communities to resolve concerns, respect resource limitations and enhance economic prosperity.

As resources become more limited and the costs of infrastructure increase, the Land Use Element encourages planning for compact, efficient and environmentally sensitive development to better utilize energy, land, water and fiscal resources. It emphasizes community-centered growth that provides people with additional travel, housing and employment choices that are closer to job centers and public facilities.

The following principles reflect the County's mission and vision to plan and develop safe, healthy, livable, prosperous and well-governed communities by balancing economic, environmental and social equity concerns in planning and development decisions. Each principle is further defined by policies and supported by implementing strategies to ensure progress toward the principles. The implementing strategies shall be started and funded within the priorities and time frames that are listed in Table G-1 in Appendix G, for timely achievement of the strategic growth policies.

***Strategic Growth Definition for San Luis Obispo County***

Strategic growth is a compact, efficient and environmentally sensitive pattern of development that provides people with additional travel, housing and employment choices. It focuses future growth away from rural areas and limited resources, closer to existing and planned job centers and public facilities where sustainable resources are available.

Strategically planned communities are urban or village areas with the following characteristics:

- Adequate resources, services and facilities for long-term growth (20 years),
- Inter-connected street systems, bicycle and pedestrian ways,
- Neighborhood areas that can accommodate a variety of housing types that are affordable to all income groups, which are located close to focal points serving daily needs,
- Adequate areas for commerce, employment, education, recreation, civic and social life.

***Strategic Growth Principles***

1. *Preserve open space, scenic natural beauty and sensitive environmental areas. Conserve energy resources. Conserve agricultural resources and protect agricultural land.*
2. *Strengthen and direct development towards existing and strategically planned*

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*communities.*

- 3.** *Foster distinctive, attractive communities with a strong sense of place.*
- 4.** *Create walkable neighborhoods and towns.*
- 5.** *Provide a variety of transportation choices.*
- 6.** *Create a range of housing opportunities and choices.*
- 7.** *Encourage mixed land uses.*
- 8.** *Take advantage of compact building design.*
- 9.** *Make development decisions predictable, fair and cost-effective.*
- 10.** *Encourage community and stakeholder collaboration.*
- 11.** *Strengthen regional cooperation.*

Together, the principles and policies define how land will be used and resources will be protected. They provide the basis for defining the 13 land use categories, determining the land areas to which they are applied, and for considering all discretionary development and land division applications. More detailed goals, objectives and policies that address specific planning issues are presented in the other chapters of this report and in the area plans.

The policies also function as criteria to help determine the consistency of a development proposal with the LUE. New development should be located, designed and built in a manner that furthers these principles and goals, as well as complying with all other provisions of the LUE.

**Principle 1: Preserve open space, scenic natural beauty and natural resources. Conserve energy resources. Protect agricultural land and resources.**

**Policies (Excerpts)**

- 1.** Maintain and protect a living environment that is safe, healthful and pleasant for all residents.
- 3.** Preserve and sustain important water resources, watersheds and riparian habitats.
- 4.** Preserve and protect the air quality of the county by seeking to exceed or at least maintain the minimum state and federal ambient air quality standards.
- 5.** Conserve energy resources by:
  - a.** Planning for energy efficiency and conservation in land use and transportation, and in subdivision and building regulations.



**Figure 1-3:** Hollister Peak

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- b. Decreasing reliance on environmentally costly energy sources, increasing conservation efforts, and encouraging use of alternative energy sources.
7. Give highest priority to avoiding significant environmental impacts from development through site and project design. Where such impacts cannot be avoided, minimize them to the maximum extent feasible.

**Implementing Strategies (Excerpt)**

5. Revise the Land Use and Conservation and Open Space Elements and County ordinances to give incentives for energy-efficient construction that minimizes its carbon footprint, especially in rural areas.

**Principle 2: Strengthen and direct development toward existing and strategically planned communities.****Policies (Excerpts)**

5. Create active and vital urban and village environments that are attractive, compact and orderly arrangements of structures and open space, appropriate to the size and scale of each community.
6. Plan adequate and convenient areas within communities for employment and economic development near transit and residential areas.
7. Phase urban development in a compact manner, first using vacant or underutilized "infill" parcels and lands next to or near existing development, as illustrated in Figure 1-6.
11. Provide adequate community amenities, parks, natural areas and trails in support of new development, which will support a high quality of life and a compact form of community development.



**Figure 1-6:** Compact community with a commercial core near residential areas (1/4 mile radius)

**Implementing Strategies**

13. Enact revisions to the Land Use and the Real Property Division Ordinances to revise or introduce regulations that will promote urban infill instead of prevent it. Consider regulations such as, but not limited to parking, height limits, lot coverage, minimum lot size, minimum densities, setbacks, street widths and similar development standards.

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**Principle 3: Foster distinctive, attractive communities with a strong sense of place.**

**Policies (Excerpts)**

1. Protect and restore the valuable history, cultures, images and identity of communities and rural areas.
  
3. Establish and maintain a distinct edge between urban and rural areas to enhance community separation while allowing for appropriate and compact urban expansion at the urban edge.
  
4. Enhance the commercial identity and viability of downtowns.
  
5. Foster a strong local identity through appropriate design of public spaces and buildings.



**Figure 1-7:** Streetscape on a downtown street

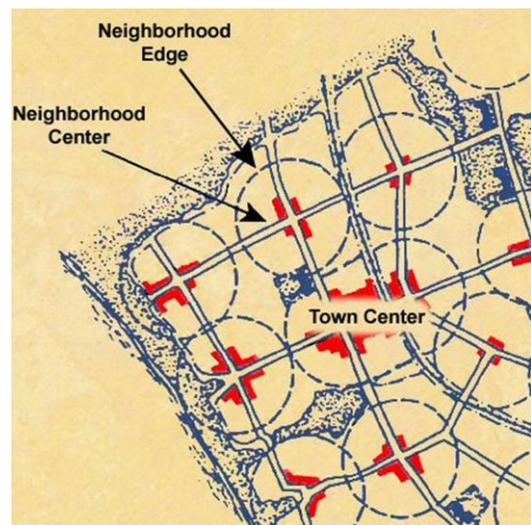
**Implementing Strategies (Excerpt)**

3. Revise the Countywide Design Guidelines to encourage appropriate, place-based (locally relevant), pedestrian-oriented designs within communities.

**Principle 4: Create walkable neighborhoods and towns.**

**Policies**

1. Plan communities with schools, parks, public spaces, transit stops and commercial districts located as focal points within convenient walking distances of neighborhoods as illustrated in Figure 1-8.
  
2. Plan for maximum connectivity between different land uses through walkways or other means.
  
3. Create attractive street enhancements and public spaces that serve as gathering places on corridors and at connecting locations.
  
4. Provide parks, natural areas and recreation facilities with new urban development to enhance a community's quality of life and improve public health.
  
5. Create neighborhoods and non-residential areas that minimize fear and crime through



**Figure 1-8:** Walkable neighborhoods

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environmental and urban design.

**Implementing Strategies**

1. Update the Countywide Design Guidelines to create maximum connectivity between neighborhoods, streets and projects for pedestrian and bicycle travel.
2. Revise the Land Use Ordinance and Land Use Element to enhance neighborhoods with small-scale and appropriate commercial areas; parks and recreation areas; public spaces; and family, cultural and civic facilities, all within convenient walking distances from housing. Work with the General Services Agency to plan and implement parks and recreation facilities.
3. Enhance downtowns and commercial areas with attractive civic and pedestrian facilities, events and promotions, and facilitate ways to finance them, for example, through forming business improvement and community facilities districts.
4. Pursue a street tree program on urban streets and public parking lots.
5. Enhance major boulevards and downtown streets with street trees, street furniture, textured crosswalks, planted medians and ornamental lighting.
6. Revise community plans, the Countywide Design Guidelines and the Land Use Ordinance to include features that will minimize fear and crime and strengthen a sense of community by environmental design methods.

**Principle 5: Provide a variety of transportation choices.****Policies**

1. Design a safe, reliable and effective transportation system that protects natural and scenic resources and minimizes environmental impacts.
2. Reduce and minimize the generation of air pollutants and greenhouse gases from existing and future development, with emphasis on reducing vehicle miles traveled.
3. Coordinate land use and transportation planning to ensure that all transportation demands can be safely and adequately accommodated.
4. Provide public transit, bicycle lanes, multi-use trails and pedestrian walkways that connect destinations within and between communities, to encourage alternative transportation.
5. Make communities more bicycle- and pedestrian-friendly with safe and attractive routes.



**Figure 1-9:** Bike lane on a residential street

**Implementing Strategies (Excerpt)**

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4. Provide multi-use trails (for walking, bicycling and equestrian travel) between and through communities, and connect them with other means of alternative transportation, consistent with the Parks and Recreation Element.

**Principle 6: Create a range of housing opportunities and choices.**

**Policies**

1. Plan for most new housing to be within urban or village areas and close to jobs while protecting residential areas from incompatible uses.
2. Provide quality housing choices that are affordable to people with a variety of income levels.
3. Provide a range of housing types within each neighborhood, and avoid creating adverse concentrations of affordable units.



**Figure 1-10:** Creekside Gardens affordable

**Implementing Strategies (Excerpts)**

1. Implement the Housing Element to implement these policies.
2. Update the Land Use Ordinance and LUE area plans to encourage a diversity of housing (sizes, types, and costs) within subdivisions and neighborhoods.
3. Revise the Countywide Design Guidelines, community design plans and specific plans to illustrate how to integrate higher density development within existing neighborhoods.
4. Amend the Land Use Ordinance to require site designs for condominium and planned development projects that provide a range of housing sizes, footprints and design features.
6. Modify the Land Use Ordinance to allow more affordable units without parking, for residents who do not wish to pay for it.

**Principle 7: Encourage mixed land uses.**

**Policies**

1. Integrate residential units designed for affordability with non-residential uses in order to bring workplaces, commercial development and homes closer together for workers, senior citizens and others..
2. Integrate complementary uses within commercial sites, in order to build effective mixed-use neighborhoods.



**Figure 1-11:** Mixed retail and residential uses in Sacramento

**INFILL SUBDIVISION AND DEVELOPMENT STANDARDS****Implementing Strategies**

1. Revise the Countywide Design Guidelines, the Land Use Element and Land Use Ordinance (LUE/LUO) to guide the design of, and offer incentives for affordable mixed-use buildings.
2. Encourage mixed-use development through affordable housing programs and regulations
3. Revise community plans and Land Use Ordinance standards to encourage the conversion of shopping centers and strip commercial streets into mixed-use developments.
4. Reduce parking standards in the Land Use Ordinance for mixed-use developments, based on their size and location in relation to a central business district or transit stop. Consider creating in-lieu parking fee programs.

**Principle 8: Take advantage of compact building design.****Policies**

1. Develop compact neighborhoods that contain residential uses that are affordable-by-design and efficient in land and energy consumption.
2. Include public and private amenities with new development to enhance the livability of compact neighborhoods.

**Figure 1-12: Compact neighborhood design****Implementing Strategies**

1. Revise the Countywide Design Guidelines to illustrate compact neighborhood and building design that fits within existing development visually and functionally.
2. Revise the Land Use and Subdivision Ordinances to encourage 1) compact buildings and subdivisions, and 2) projects that include amenities such as small-scale plazas, formal gardens, playgrounds and natural areas.
3. Reduce the Land Use Ordinance requirements for off-street parking where uses are planned close to each other in compact neighborhoods, to increase the viability of projects and encourage other kinds of transportation.
4. Work with developers and communities to finance and build community parking facilities near compact development.
5. Continue public education efforts about compact residential design and building

**Principle 9: Make development decisions predictable, fair and cost-effective.****Policies**

1. Minimize administrative delays and costs to fee payers in the administration of the Land Use Element.
2. Expedite development review procedures and provide incentives, such as reduced fees for facilities and other project-related costs, for projects that implement these principles.

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3. Encourage public participation in planning and development review, and consider the needs of all affected persons.
4. Use easy-to-understand language and media to convey proposals and ideas clearly.

**Implementing Strategies (Excerpts)**

1. Simplify and illustrate zoning and design standards within the Land Use Ordinance or similar document in order to make them clear and understandable, for example, through use of a “form-based” code.
2. Identify suitable locations for strategic growth projects that are consistent with these principles to be eligible for expedited review.

**Principle 10: Encourage community and stakeholder collaboration.****Policies**

1. Provide opportunities to incorporate public opinion early and often within the planning process.
2. Cultivate relationships with those having a stake in the outcome.
3. Encourage cooperation between the County, cities and unincorporated communities to avoid and solve growth and development issues early.
4. Work with County departments to achieve compact, mixed-use, walkable communities by coordinating regulations, project review, transportation funding and capital improvement programming.

**Figure 1-13:** Planning workshop**Implementing Strategies (Excerpts)**

1. Inform the public and stakeholders about strategic growth by various means, such as forums and the media.
2. Build on previous efforts to create consensus with the public about attaining compact, walkable communities and rural preservation.
3. Involve the public, advisory and other groups, cities and other jurisdictions often and routinely in the planning and development review processes by early outreach, referrals and responses.
4. Provide more access to County media to enhance the public’s understanding of planning and project review.
- 7.. Work with communities to avoid approving projects that are not supported by a city or a community services district within its sphere of influence or urban area.

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**Principle 11: Strengthen regional cooperation.**

**Policies (Excerpt)**

2. Collaborate with communities, stakeholders and the public to plan according to strategic growth principles, and encourage “ownership” of the process and the outcomes.