



Scope of Work: Public Facility Financing Plan – San Miguel Community Plan Update

SECTION 1: GENERAL INFORMATION

1.1 Purpose

The purpose of this Request for Proposals (RFP) is to provide interested consultant firms with sufficient information concerning the services desired by the County of San Luis Obispo. This information is intended to enable the firms to prepare and submit proposals to prepare a public facilities financing plan, which will become a component of the San Miguel Community Plan.

1.2 Inquiries

If the consultant has any questions in regards to this RFP, please contact **Michael Conger** at **(805) 781-5136** or mconger@co.slo.ca.us.

1.3 Contract Amount

The consultant shall prepare a cost estimate based upon the services requested in this RFP. The public facilities financing plan document shall be bid at a firm, fixed price. Staff meetings and public hearings shall be bid on a time and materials basis. Approximately **\$33,350** has been budgeted for this plan.

1.4 Project Background

The County is undertaking a comprehensive update to the San Miguel Community Plan. As part of this plan, we anticipate changes to land use categories (i.e. zoning), land use and circulation goals and policies, and establishment of implementation standards and programs including development of a mechanism for public facility financing.

1.5 Project Location

The community plan update will affect the unincorporated town of San Miguel, which is located approximately 6 miles north of Paso Robles and 2 miles south of the Monterey County Line, along US Highway 101.

1.6 Project Description

A detailed project description is attached for your review.

SECTION 2: SCOPE OF WORK

2.1 General Requirements

The public facilities financing plan will be used to guide further development of a Capital Improvement Plan for the community of San Miguel. The plan should be consistent with the



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standards and requirements specified in California Government Code Sections 66000 et seq. Additionally, the plan must not conflict with applicable case law on exactions, including the decisions rendered in *Nollan v. Coastal Commission* (i.e. “nexus”) and *Dolan v. City of Tigard* (i.e. “rough proportionality”).

2.2 Analysis

Analysis shall be done under the direction of a qualified consultant with expertise in preparing public facilities financing plans, and shall include:

- A. Review of pertinent background documents, including those identified in Section 5.
- B. Analysis of existing conditions, including a description of existing public facilities and an itemization of existing deficiencies. Facilities to be analyzed under this document include the following:
 - (1) Circulation improvements (e.g. roads, railroad crossings, pedestrian and bicycle circulation)
 - (2) Wastewater system
 - (3) Water system
 - (4) Storm drainage (in compliance with Low Impact Development requirements)
 - (5) Libraries

Other public facilities, listed below, are already subject to existing fee programs to fund capital improvements. These facilities need not be analyzed as part of this plan, but a qualitative discussion on options for augmenting existing funding programs shall be included.

- (6) Sheriff’s patrol and investigation
 - (7) Fire protection
 - (8) General government
 - (9) Schools
 - (10) Parks
- C. Discussion on which specific facilities are needed up-front, and whether new development is obligated to construct these facilities even if it exceeds their fair share contribution.
 - D. Projection as to the need, capacity, and opinions of probable costs for public facilities to serve San Miguel through the Year 2035, as anticipated under the proposed community plan. The methodology, assumptions, and calculations used to arrive at these figures is to be clearly articulated.
 - E. Recommendations for phasing the construction of public facilities over the life of the plan. These recommendations should identify what activity or level of development will trigger the need to construct, expand, or otherwise improve each facility.
 - F. Description of the proposed funding strategy to cover funding gaps (e.g. costs associated with existing deficiencies, costs that cannot be funded by new development, etc.), as well as a discussion on each strategy’s applicability to San Miguel.
 - G. Description of the potential funding strategies to cover costs associated with new development, as well as a discussion on each strategy’s applicability to San Miguel.
 - H. Estimates of the “per-unit” fair share cost for each facility, which may be an example of an impact fee.



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2.3 Kick-Off Meeting

The consultant shall be available for a “kick-off” meeting and to meet with one or more County staff members, staff from outside agencies, and/or stakeholders. The cost estimate shall include the “kick-off” meeting. The purpose of this meeting will be to accomplish the following:

- A. Establish the project development team to oversee the process.
- B. Review the scope-of-work and finalize the work plan.
- C. Establish communications protocol.
- D. Establish project budget and schedule.
- E. Develop consensus on key project issues, goals, and methodologies.

2.4 Optional Tasks

As part of the proposal, please provide a separate description of the work plan, methodology, timing, and cost for the following tasks. These optional tasks will be exercised at the option of the County:

A. *Traffic Impact Fee Analysis*

- (1) Prepare conceptual engineering studies to provide opinions of probable costs for the transportation improvements necessary to support the community plan.
- (2) A traffic “nexus” analysis based on the traffic model.
- (3) Estimates for the traffic impact fee on a per-unit basis (residences) or per-trip basis (other development).
- (4) Coordination with the County’s transportation consultant in the expansion or modification of the traffic impact fee program for San Miguel

B. *Attendance at Public Hearings*

Attendance at up to **two (2)** public hearings may be necessary. The consultant shall be prepared to respond to questions, make presentations, and/or participate in an advisory capacity during the hearings. The costs for attendance at public hearings shall be itemized.

C. *Attendance at Additional Meetings*

In addition to the kickoff meeting, please provide cost estimates for attendance of additional meetings and/or teleconferences. Up to **three (3)** additional meetings may be necessary.

2.5 Project Coordination

The proposal must reflect sufficient time budgeted for project management tasks, including (but not limited to) the following:

- A. Communication with agency staff and project stakeholders, as necessary, to discuss and resolve key issues in a timely manner.
- B. Establishing and maintaining project records, including meeting records, paper and email communications, documentation, deliverables, invoices, etc.
- C. Day-to-day project staff management.
- D. Quality control/assurance.



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E. Budget control/assurance.

2.6 Deliverables

The format for all text documents, tables, charts, and illustrations shall be formatted to be printed on **8½ inch by 11 inch** paper. If oversize inclusions are necessary, they will be formatted to **11 inches by 17 inches**. Documents and exhibits should be able to be read and interpreted when reproduced in black and white. Document covers for all related documents shall be coordinated so they appear as a "set". The final report should be designed to effectively convey information to the public, with technical information placed in the appendices. Digital copies of all administrative drafts, drafts, and final documents shall be provided in both Adobe Portable Document Format (PDF) and editable Microsoft Word format. The digital copies may be submitted either on compact disc or by providing a link for download. In the interest of reducing unnecessary energy consumption, we ask that hard copies not be submitted. Deliverables shall include the following:

- A. A technical memorandum summarizing existing conditions of public facilities in the community.
- B. A second technical memorandum identifying the public facilities needs of the community in the Year 2035. This memorandum is to include cost estimates for the public facilities and a preliminary discussion of funding strategies.
- C. Administrative draft public facilities financing plan.
- D. Draft and final public facilities financing plan.

SECTION 3: PROPOSAL CONTENT

3.1 Form

Proposals and supporting materials shall be submitted in digital format on compact disc or by providing a link for download. Acceptable formats include Microsoft Office (.doc,, .docx, .xls, .xlsx) and Adobe Acrobat PDF (.pdf). 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 RFP. In the interest of reducing unnecessary energy consumption, we ask that you not submit hard copies of your proposal.

3.2 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.

3.3 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.



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- 3.4 Task Timetable and Cost Estimate
The proposal shall contain the tasks required to complete the project with a time frame for each task.
- 3.5 Cost Saving Strategies
With your proposal, please include strategies and estimates for reducing costs. These strategies may include eliminating unnecessary tasks from the scope of work or other appropriate measures to streamline the analysis while still maintaining professional standards.
- 3.6 Objectivity
This study will be used in the preparation of a community plan. Community plans are to be an independent, objective, and unbiased work product. Proposals shall certify that the consultants, principals, and subcontractors (if used) have the capacity to submit a neutral and unbiased environmental document.

SECTION 4: CRITERIA FOR EVALUATION OF PROPOSAL

- 4.1 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.
- 4.2 Methods and Procedures
- A. Consultant's general approach to evaluating the issues.
 - B. Complete description of the procedures and analytical methods to be used.
- 4.3 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.
- 4.4 Consultation and Coordination with the County
- A. Procedures to be used to ensure close contact between the consultant and the project coordinator.
 - B. Demonstrated experience in working with local government.
- 4.5 Cost Estimates
- A. Experience, qualifications, and costs appropriately matched to the tasks.
 - B. Quality of the product delivered, relative to the total cost.
 - C. Reasonableness of cost estimates.
 - D. Cost saving strategies.



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SECTION 5: EXISTING INFORMATION

The following documents, policies, and data contain information and standards pertaining to land use and circulation in San Miguel. These sources should be reviewed and considered as part of the public facilities financing plan:

5.1 Background Information

- A. *Land Use and Circulation Element of the County General Plan*
 - (1) Framework for Planning – Inland
 - (2) Salinas River Area Plan
 - (3) Land Use Category Map for San Miguel
 - (4) San Miguel Design Plan

- B. *Other County Documents*
 - (1) Public Facilities Financing Plan for Unincorporated Area Facilities
 - (2) Economic Element of the General Plan
 - (3) San Miguel road impact fee program

- C. *Any applicable facilities plans and/or capital improvement programs for the following agencies and/or facilities*
 - (1) County of San Luis Obispo – roads, storm drainage, general government, libraries, police protection
 - (2) San Miguel Community Services District – water, wastewater, fire protection, parks
 - (3) San Miguel Joint Union School District – K-8 education
 - (4) Paso Robles Joint Unified School District – 9-12 education

5.2 Specific Information

- A. *Preliminary Draft of the Community Plan Update*
 - (1) Land Use Concept Plan.
 - (2) Plan Goals
 - (3) Alternatives to be considered in the EIR (once developed).