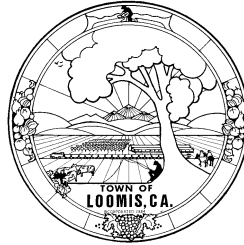


TOWN OF LOOMIS PLANNING DEPARTMENT



REQUEST FOR PROPOSALS

FOR PLANNING SERVICES FOR THE YEARS 2023-2028

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**TOWN OF LOOMIS
PLANNING DEPARTMENT**

**REQUEST FOR PROPOSALS
ON-CALL PLANNING CONSULTANT
FOR THE YEARS 2023-2028**

1. INTRODUCTION

The Town of Loomis, California (herein referred as "TOWN") is requesting professional on-call planning service proposals from a qualified firm or team of consultants to augment professional town planning services for the Community Development Department, Planning Division. The Town requests written responses to a Request for Proposal (RFP) for selection of on-call or as-needed planning services associated with one or more proposed projects, including but not limited to, general planning-related development and land use project review, site visits, technical plan check for planning documents and plans, map review, conformance with Federal, State and local regulations, particularly the California Environmental Quality Act (CEQA) and general compliance with Town Standards, Ordinances, and Regulations.

To control costs and provide a high level of professional services to all Town departments and the community, the Town believes the interests of the community can be best served by using a private firm for additional Town Planning services. The Town is expecting new development projects and additions to existing businesses over the next few years. In addition, the Town will be beginning the process of updating the Zoning Ordinance, which will also require environmental review and specialty consultants. It is expected that such a firm would be able to contract available resources in response to work flow demands as they arise.

The Town's Planning Consultant ("Consultant") will work under the direction of the Town's Planning Director. The Consultant will provide the range of expertise necessary to carry out the normal functions of a professional planner. All services provided by the Consultant shall be performed by individuals who meet the qualifications, education, and certifications/licensing requirements for professional Planning levels of Assistant to Senior Planner.

2. BACKGROUND

The Town of Loomis is located in southern Placer County, approximately ten miles west of Auburn, and adjacent to City of Rocklin to the west. Loomis has a population of about 6,800 residents and an area of 7.0 square miles. Most of the town is comprised of large rural residential lots. The old historic town center with its robust historic central business district and quaint residential neighborhoods, provides its small-town identity.

The Town of Loomis is a general law Town with a Council-Town Manager form of government. Legal services for the Town are provided by an independent contractor. Police services are provided under a contract with the Placer County Sheriff's Department, and Fire Services are provided by the South Placer Fire District (SPFD). Water and sewer services are provided by the Placer County Water Agency (PCWA) and the South Placer Municipal Utility District (SPMUD) respectively.

3. SCOPE OF SERVICES

In general, the successful individual or firm will be expected to provide on-call planning services for all type of projects requesting entitlements, including but not limited to new residential, commercial, and industrial projects.

The on-call planning services that a successful applicant would provide include, but are not limited to the ability to perform the following:

- A. Develops and maintains good working relationships with other town departments, other jurisdictions, and the public.
- B. Analyze projects for compliance with the Town's General Plan, zoning ordinance, Subdivision Map Act, Design Guidelines, applicable specific plans and other policies.
- C. Compiles and analyzes data on economic, social, environmental, and physical factors affecting land use.
- D. Meets with developers, engineers, property owners, contractors and other individuals to discuss, advise, explain processes and suggest improvements regarding potential projects, pre-applications, development applications, feasibility analysis, conceptual development plans and code interpretation.
- E. Ability to write Planning Commission and Town Council staff reports, resolutions, ordinances, conditions of approval, and give oral presentations.
- F. Attend public hearings and community meetings as necessary.
- G. Analyze projects for CEQA compliance.
- H. Ability to review projects and provide comments within timelines specified by the Permit Streamlining Act and the Town (shorter timelines may be required for certain projects).
- I. Provide strong emphasis on the management of multiple projects and competing priorities while maintaining quality, meeting schedules and staying within budget.
- J. Facilitation of special project.

4. PROPOSAL REQUIREMENTS

The proposal shall clearly address all information requested herein. To achieve a uniform review process and obtain the maximum degree of comparability, proposals must be organized and contain all information as specified below:

- A. **Cover Letter.** Maximum of two pages serving as an executive summary which shall include an understanding of the scope of services.
- B. **Brief Company Profile.** General company information including number of employees, location of company headquarters and branch offices, number of years in business and

organization, disciplines, and staffing. Describe the general qualifications of the firm as they relate to the work proposed with this RFP.

- C. **Organization and Staffing.** Provide a list of the Consultant's employees and agents which the consultant anticipates assigning to this project. This list shall include a summary of the qualifications, licenses, and experience of each individual, and the professional Planning level of work to be performed by each individual. The Town will retain under its agreement with the successful Consultant the right of approval of all person(s) performing under the agreement.
- D. **Description and Approach.** The proposal should demonstrate the Consultant's knowledge of the needs and objective of the work proposed under this RFP.

Describe any special resources the project team may bring to the Project. Such resources and experience may include items such as special computerized drafting systems, specific recent experience working on related projects, and recent experience in the Town of Loomis and/or other Placer County jurisdictions. Elaborate on why the project team stands above the competition.

- E. **Subcontractors.** The bidder must provide for each subcontractor of the bidder, the scope of services to be provided by such subcontractor and a Statement of Qualifications, as outlined above, for such subcontractor.
- F. **Cost Proposal.** The cost proposal shall include the hourly rate for services. Include any sub-consultant's fee schedule, if applicable. This should include hourly billable costs of each team member; Senior Planner, Associate Planner, etc.
- G. **Résumé, Relevant Projects/Services with References.** Provide résumés of the individuals(s) from the Proposer's firm or entity that will be directly responsible for carrying out the contract, three references to include name, address, contact person and phone number of the municipality/company, length of time services were provided, and a description of the services provided.
- H. **Conflicts of Interest:** The Consultant must not have a conflict of interest with regard to any other work performed by the firm for the Town.
- I. **Anticipated Potential Problems.** The proposal should identify and describe any anticipated potential problems, the bidder's approach to resolving these problems and any special assistance that will be requested from the Town.

5. FEES AND EXPENSES

- (a) The Town will consider an hourly fee, a task-based fee or a flat-fee Proposal, or any combination thereof. The contract to the successful bidder, however, will contain agreed-upon maximum limit(s). Thus, each bidder is invited to provide a reasonable estimate of the maximum fee.
- (b) Town will agree to reimburse Consultant for its direct, reasonable and necessary expenses incurred on the project, including but not limited to the following:

- (i) Expense of reproductions, postage and handling of Drawings, Specifications and other documents, excluding reproductions for office use of Contractor;
 - (ii) Expense of renderings, models and mock-ups; and
 - (iii) Other items authorized by writing and in advance by Town Manager.
- (c) All expenses in excess of \$750.00 per month must be approved in advance in writing by the Town Planner or Town Manager.

6. PROPOSAL DOCUMENTS

Four (4) hardcopies and one (1) digital pdf copy of the proposal documents must be submitted no later than **12:00 noon, April 7, 2023** to the Office of the Town Clerk. Proposals must be titled "RFP On-Call Planning Services, Attn: Christy Consolini, Planning Director." No postmarks will be accepted. Incomplete proposals and proposals not organized according to this RFP may be rejected. A faxed or emailed proposal will not be accepted.

7. COMMUNICATIONS ABOUT THE RFP

Telephone communications with Town staff about the RFP are not encouraged but will be permitted, however; any such oral communication will not be binding on the Town. All telephone questions regarding this project should be directed to:

Christy Consolini, Planning Director
Town of Loomis Planning Department
3665 Taylor Road
P.O. Box 1330
Loomis, CA 95650
Phone: (916) 652-1840 x21
Email: cconsolini@loomis.ca.gov

8. SELECTION PROCESS

- (a) The Proposals will be reviewed by an evaluation committee to determine which Consultants will be included in a final interview process. All firms submitting proposal will be notified in writing as to whether they are or are not selected to be interviewed. The committee will then conduct an interview with those Consultants and will rank the interviewees based on their submitted materials and performance.
- (b) The evaluation committee will make determination of the firms to be included on the list of consultants, based upon the highest relative scores.
- (c) The evaluation committee will consist of at least two members who have technical expertise in relevant fields or who are involved in project review at various managerial levels.
- (d) The identity of members of the committee will be confidential until the interviews are held.

9. EVALUATION CRITERIA

The determination whether a Proposer is pre-qualified will be based on a combination of factors as determined to be in the best interests of the Town, which include, but are not limited to the following factors:

- (a) Ability of the bidder to best perform the work, as measured by qualifications, past performance, knowledge of and experience with local, state and federal standards, regulations, guidelines, criteria and laws;
- (b) The bidder's responsiveness to this Request for Proposals;
- (c) Quality of Proposal, including but not limited to the Bidder's planned approach to the project;
- (d) Interview Presentation, e.g., whether the presentation is concise, relevant and informative.

10. PUBLIC RECORDS ACT

Each bidder should be aware that although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the Town of Loomis may not be in a position to establish that the Proposal which the candidate submits is a trade secret. If a request is made for any information marked "confidential" by a bidder, the Town will provide the candidate who submitted such information with reasonable notice to allow the candidate to seek protection from disclosure by a court of competent jurisdiction.

11. RELEASE OF REPORTS AND INFORMATION

Any reports, information, data, or other material given to, prepared by or assembled by the bidder as part of the work or services under these specifications shall be the property of the Town and shall not be made available to any individual or organization by the bidder without the prior written approval of the Town.

12. CONTRACT DOCUMENTS

The successful Consultant will be expected to execute a Master Professional Services Agreement that contains the terms and conditions set forth in the form contract that is attached hereto as Exhibit A. The Consultant is reminded that any proposed change to the form contract will be considered in determining the firm's suitability for inclusion in the interview process.

13. TERMS AND CONDITIONS

- (a) *Proposal Costs.* This request for proposals does not commit the Town to pay for any costs incurred in the submission of a response or make any necessary studies or designs for the preparation thereof nor the purchase or contract for services in connection with the preparation of a submission. All costs in preparing and submitting a proposal shall be borne by the person making the proposal.
- (b) *Withdrawal.* A bidder may withdraw a proposal without prejudice prior to the time specified for opening by submitting a written request to the Town Manager for its withdrawal, in which

event, the proposal will be returned to the bidder unopened. No proposal received after the time specified or at any place other than that stated in the "Notice Requesting Proposals" will be considered.

- (c) *Retention and Use of Proposals.* The Town reserves the right to retain all proposals and use any idea in any proposal regardless of whether that proposal is selected. The Town also reserves the right to waive non-substantial irregularities in any proposal, to reject any or all proposals, to reject or delete one part of a proposal and to accept others, except to the extent that proposals are qualified by specific limitations, and to make an award as the interest of the Town may require.
- (d) *Agreement.* The Town reserves the right to negotiate any and all terms of an agreement including length, scope of services and compensation.
- (e) *Awarding Authority.* An agreement with the Contractor shall not be binding unless and until it is approved and executed by the Town Council or Town Manager depending on the dollar amount.
- (f) *Competency and Responsibility.* The Town reserves full discretion to determine the competence and responsibility, professionally and/or financially, of bidders. Bidders will provide, in a timely manner, any and all information that the Town deems necessary to make such decision.
- (g) *No Award.* The Town may, for any reason, not award an agreement as a result of this RFP.
- (h) *Execution of Contract.* The bidder to whom award is made will be expected to execute a written contract with the Town within twenty (20) calendar days after notice of the award has been mailed to the address given in the proposal. The substance of the contract will include the terms of this Request for Proposals and the form will be mutually acceptable to both parties.