



## STAFF REPORT

### TOWN COUNCIL MEETING OF OCTOBER 14, 2014

To: Town Council

From: Town Manager

Subject: Request for Proposals (RFP) for Contract Planning Services

Date: November 02, 2012

#### **RECOMMENDED ACTION:**

Authorize the Town Manager to issue an RFP for Contract Planning Services

#### **DISCUSSION:**

Currently the Town contracts with Marianne Nockles-Lockwood part time to handle the planning duties of the Town including the processing of day to day permit applications, preparation of and oversight of environmental documents and the agenda preparation and staffing of the Planning Commission meetings. Unfortunately, Marianne has decided to retire and her last day of work was on September 23, 2014. While Ms. Nockles-Lockwood is currently operating under a temporary contract with the Town, staff believes it is beneficial to the Town at this time to obtain a planning consulting firm to perform the services on an as needed basis, similar to how the Town currently processes the Building Inspection and Plan Check services with Bureau Veritas. A consulting firm would provide a multitude of additional services that could include environmental document review and preparation, development standard reviews, and General Plan and Zoning Amendments as needed and as may be desired by the Town Council.

Current and forecasted development levels in Loomis do not appear to justify the creation and hiring of a full time planning employee with additional costs to the Town for benefits, liability insurance and retirement pension. A temporary contract with a planning consultant firm will be entered into to fill the gap until a permanent planning consulting firm can be hired.

As such, I am recommending that an RFP be sent to a minimum of 3 consulting firms who perform this type of work. In addition, the Town will notice the availability of the RFP on the Town's Web site.

**CEQA:**

There are no CEQA issues associated with this item.

**FINANCIAL IMPLICATIONS:**

Financial implications will be evaluated based on the submitted bids.



Issue Date: October \_\_, 2014

**TOWN OF LOOMIS  
REQUEST FOR PROPOSALS  
CONTRACT PLANNING SERVICES**

Please carefully read and follow the instructions. Please direct all questions to:

Town of Loomis  
Town Manager  
3665 Taylor Road, P.O. Box 1330  
Loomis, Ca 95650  
Attn. Rick Angelocci  
Phone: 916-652-1840  
Fax: 916-652-1847  
E-Mail: [rangelocci@loomis.ca.gov](mailto:rangelocci@loomis.ca.gov)

**PLEASE RESPOND BY: 3:00 P.M., ON OCTOBER 31, 2014**

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SECTION 1

**INTENT OF THE REQUEST FOR PROPOSALS**

**1.1. INTRODUCTION**

Currently, the Town has no full-time planner on staff other than a planning assistant/administrative clerk. The Town Manager currently serves as the Town's Planning Director. Most projects are currently reviewed by an experienced planner currently under a temporary 2 day a week contract with the Town. To meet our planning review service goals and to ensure a streamlined permit review process, we seek the assistance of a planning consulting firm to address the weekly workload throughout the year.

Under general supervision of the Planning Director, the selected consultant firm would perform a variety of professional level duties and responsibilities in support of the Town's current and advanced planning functions including research and analysis for residential and commercial development projects, environmental review and preparation of environmental documents, and research and preparation of general plan amendments and zoning ordinance amendments for presentation to the Planning Commission and Town Council; and provide information and assistance to applicants, developers, consultants, the general public, and outside agencies and organizations regarding Town codes, policies, standards, and processes related to planning related matters.

Consultants who respond to this RFP do so with the understanding that plan review and/or planning consultants to the Town of Loomis are responsible solely to the Town when providing services during the contract period. The selected consultant firm is prohibited from performing work for private sector clients in the incorporated area of the Town of Loomis for the period that services are provided. All services provided will be on an "as needed" basis as determined by the Town Manager.

The Consultant Services will be in effect for one year and may be renewed if services provided are satisfactory to the Town and continued services are mutually agreeable.

**1.2. SCHEDULED ACTIVITIES**

To the extent achievable, the following schedule shall govern the RFP. The Town reserves the right to modify the dates below.

| <u>Activity</u>                                       | <u>Estimated Schedule Date</u> |
|---|--------------------------------|
| 1.2.1. Availability of the Request for Proposals      | October __, 2014               |
| 1.2.2. Closing Date for the Request for Qualification | October 31, 2014               |

## SECTION 2

### REQUESTED INFORMATION

Responses to this RFP must include, but are not limited to:

- A. Provide the name, business address, and telephone number of the proposing firm.
- B. Provide a description of the proposing firm, including services offered by the firm and total number of planners and other certified and/or licensed professional staff (i.e., AICP). Licensed professionals shall be California Licensed in accordance with the appropriate California Business and Professions Codes.
- C. Provide a summary of the consultant's approach in performing planning services for the Town.
- D. Provide an Organization Chart and the resumes of the key personnel who may be assigned for the Town of Loomis planning review and services.
- E. Provide names, titles, addresses and telephone numbers of 3 references for the proposing firm's suitability, experience, satisfactory performance, and timely responses in performing planning review and services.
- F. Provide a schedule of hourly billing rates for the firm for planning review and services. Specifically identify the billing rates for the key personnel proposed to be assigned to the Town of Loomis. The schedule of billing rates must be provided in a separate sealed envelope.

Please feel free to include any relevant brochures, white papers, etc, a brief history of your company, a summary of relevant background information, a describing your company's experience of major accomplishments and/or activities similar to the information requested, etc.

#### **Evaluation Criteria**

The following criteria will be used by the Town of Loomis in evaluating proposals:

- A. Experience and competence of the identified key personnel in the areas of work identified in the proposal.
- B. Consultant's previous experience on satisfactory planning related service for other clients.
- C. Reference recommendations.
- D. The Town reserves the right to consider billing rates once it has developed a list of consultants qualified to perform the work.

**SECTION 3**  
**INFORMATION TO RESPONDENTS**

**3.1. REQUEST FOR INFORMATION CLOSING DATE**

Responses must be received at the Town of Loomis Town Hall on or before 3:00 p.m. on **October 31, 2014**. Please provide responses in a sealed envelope, box or appropriate package with the RFP name marked on the outside (or in the subject line of the e-mail) and deliver to:

Town of Loomis  
Town Manager  
3665 Taylor Road, P.O. Box 1330  
Loomis, Ca 95650  
Attn. Rick Angelocci  
Phone: 916-652-1840  
Fax: 916-652-1847  
E-Mail: [rangelocci@loomis.ca.gov](mailto:rangelocci@loomis.ca.gov)

Please submit **one (1) original signature hard copy** to be signed in blue ink (original copies marked as such) and **one (5) additional copies**. **Billing rates must be provided in a separate sealed envelope with the responding firm's name on the outside.**

**3.2. INTERPRETATION, CORRECTIONS AND ADDENDA**

Please carefully examine the specifications, terms and conditions provided in the Request for Proposals. If you find an ambiguity, conflict, discrepancy, omission or error or if you have any questions please notify the contact person as shown above in 3.1 REQUEST FOR PROPOSAL CLOSING DATE by the date shown in Deadline for Submission of Interpretation and/or Questions in 1.2 SCHEDULE OF ACTIVITIES. Any change in the RFP will be made only by written addendum, issued by the Town Manager and shall be incorporated in the RFP.

**3.3. GENERAL INFORMATION**

**THE TOWN SHALL NOT BE LIABLE FOR ANY COSTS INCURRED BY THE PROPOSING FIRM IN CONNECTION WITH THE PREPARATION AND SUBMISSION OF THIS OR ANY OTHER RESPONSE TO AN RFP.**

All responses and accompanying documentation submitted will become the property of the Town of Loomis and will not be returned.

The Town of Loomis reserves the right to reject any or all proposals, wholly or in part, received by reason of this request. All costs incurred by the consultant due to developing their proposal shall be borne by the consultant. The firm to be selected will be at the discretion of the Town Council.

**ATTACHMENT -A**

**SIGNATURE PAGE**

(PLEASE COMPLETE AND PLACE IN FRONT OF RFP)

INDIVIDUAL/COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
(P.O. Box/Street) (City) (State) (Zip)

CONTACT PERSON: \_\_\_\_\_

TITLE: \_\_\_\_\_

TELEPHONE NO.: \_\_\_\_\_ FAX NO.: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

WEB SITE URL: \_\_\_\_\_

The undersigned hereby certifies that he/she is a duly authorized official of their organization and has the authority to sign on behalf of the organization and assures that all statements made in the response to the RFP are true.

\_\_\_\_\_  
Authorized Representative - Name Title

\_\_\_\_\_  
Signature Date