

# OAKLEY



## STAFF REPORT

**DATE:** January 8, 2019

**TO:** Bryan Montgomery, City Manager *Approved and Forwarded to the City Council*

**FROM:** Joshua McMurray, Planning Manager

**SUBJECT:** **Request for Proposals/Qualifications for the City of Oakley General Plan Update**

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### **Background and Recommendation**

The City's General Plan was originally adopted in December of 2002 and has since been updated as needed (2010, 2015 and 2016). Typically, a California city's general plan may be active for a maximum 15-20 years before a more overall update is considered.

The City is seeking a consultant that has extensive experience in preparing General Plans, a proven ability to assess a City's current condition, and the knowledge of current State and Federal regulations as they apply to the completion of General Plan update and California Environmental Quality Act (CEQA) review.

Staff plans on releasing the RFP/RFQ on January 9, 2019 and all responses will be due on February 8, 2019. That will allow some time for Staff to review the proposals and then Staff would bring the proposals to the City Council in early March to approve a consultant and move forward with the update.

Staff recommends the City Council approve the Request for Proposals and Qualifications and direct Staff to release the document to solicit responses that will be reviewed and brought back to the City Council for approval.

### **Fiscal Impact**

Approximately \$200,000 has been allocated over the past two budget years for this project. The City is looking to start the update in March and complete it within 12-18 months.

**Recommendation**

Staff recommends the City Council approve the Request for Proposals and Qualifications and direct Staff to release the document to solicit responses that will be reviewed and brought back to the City Council for approval.

**Attachments:**

1. Draft Request for Proposals and Qualifications

# OAKLEY



# CALIFORNIA

## City of Oakley General Plan Update

Request for Proposals &  
Qualifications

Issued on January 9, 2019  
Responses Due by February 8, 2019

Submittals:  
City of Oakley | Planning Division  
Attn: Joshua McMurray, Planning Manager  
3231 Main Street  
Oakley, CA 94561

## **Introduction:**

The City of Oakley is situated in eastern Contra Costa County, along the shore of California's fabulous 1,000 mile delta waterways. The City of Oakley incorporated in 1999 to manage growth more effectively, improve community services, and the quality of life.

Oakley's broad appeal is its ability to maintain its small-town charm and character. Residents enjoy a variety of community events throughout the year such as the City's Annual Cityhood Celebration held each July to commemorate its Incorporation, the Heart of Oakley and Harvest Festivals held each September and October at the City's Civic Center Plaza, Movies in the Park, and the Annual Tree-Lighting Ceremony in December to kick-off the holiday spirit in and around the City.

Cultivating a strong sense of community and civic pride are the cornerstones to the City's success. Building on its rich heritage, City leaders understand the importance of balancing growth and preserving a high quality of life for its citizens. The City's motto, "A Place for Families in the Heart of the Delta" is evidenced everywhere you go – the City boasts highly ranked schools, safe neighborhoods, and was also named by "San Francisco Magazine" as one of the best places to raise a family in the East Bay. Oakley's vision is to become a vibrant Delta community, where families live, work, play, shop, and visit.

The City is growing, with a majority of the development being Single-Family homes. As of this year, the City has approximately 4,500 entitled units. A majority of the homes are within the East Cypress Corridor Specific Plan area, which is a primary growth area for the City. The City does have a Certified Housing Element with several properties in the City designated for affordable housing. With that said, the City is focused on attracting new commercial development that will provide for goods and services not available in the City as well as provide for new jobs that will help utilize a workforce that primarily commutes to other areas for employment.

## **Background:**

Incorporated on July 1, 1999, the City of Oakley is located in eastern Contra Costa County along the shore of the Sacramento-San Joaquin Delta near the cities of Brentwood and Antioch. In 2002, the City of Oakley adopted its first General Plan, setting forth a policy framework to guide the City's long-term growth and development based on the community's shared goals and aspirations through the year 2020. With the Plan's horizon year approaching, the City is initiating a new update of the document so that it can continue providing critical guidance through the year 2040 and beyond. The City is seeking proposals

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from qualified planning and environmental consulting firms interested in preparing the update and the corresponding environmental documentation needed to comply with the California Environmental Quality Act (CEQA). Approximately \$200,000 will be allocated for this project. The City is looking to start the update in March and complete it within 12-18 months.

It is important to note that this update is not envisioned as a wholesale rewrite, but rather a 'refresh' of the existing Plan intended to accommodate projected growth, address current community issues, and meet new statutory requirements. The existing Plan consists of nine elements: Land Use; Circulation; Growth Management; Economic Development; Open Space and Conservation; Parks; Health and Safety; Noise; and Housing. No additional elements would be prepared as part of the update; however, the City is looking to incorporate environmental justice pursuant to SB 1000, climate change, policies addressing bicycle lane/facilities and complete streets and the implementation of SB 743 mandates. The 2015-2023 Housing Element was adopted and certified in 2015, but the City understands that minor amendments may be necessary to ensure consistency with the updated Plan.

The successful consultant team will have significant experience preparing general plan updates for diverse, suburban communities like Oakley along with community outreach, public engagement, and meeting facilitation experience. They will also be expected to deliver high-quality services and products, develop professional meeting and web-ready graphics, and work cooperatively with City staff, outside agencies, City Council members, and the public throughout development of the update. Consultants should also be familiarized with the City's current General Plan, the Downtown Specific Plan, and the East Cypress Corridor Specific Plan (see weblink at end of RFP).

## **II. Scope of Services:**

Proposals should be specific and concise, and should conform to the following outline to enable the City to provide consistent review of all proposals:

### **A. Scope of Work**

Proposals should follow the format outlined below and all requested information must be supplied. The proposal requirements are as follows:

1. Develop a schedule for preparation and preliminary City Council approval of the Oakley General Plan Update.
2. Update all required sections of the General Plan as a result of changes in State Law.
3. Prepare preliminary drafts, a final draft, and the final General Plan Update, in compliance with the requirements of State Law.

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4. Prepare revisions to the Oakley 2020 General Plan in response to Staff, the City Council, and the public/stakeholders.
5. Prepare the environment document. (Please see D. Environmental Review section below)
6. Prepare a public participation program: 1) one "kick-off" meeting with the City Staff; 2) two educational and public informational meetings with the public; 3) two City Council work sessions; and 4) at least one City Council meeting.
7. Assist in the preparation of public meeting presentation materials, letters, memos, and other documents as required by City Staff in paper and electronic forms. (City Staff will prepare Staff Reports and Resolutions, and prepare, post, mail, and publish public hearing notices.)
8. Provide regular progress reports to Staff, and as necessary to communicate updates.

#### **B. Content of Proposal and Statement of Qualifications**

1. Please include a detailed description of each appropriate component of the project and how each task will be completed.
2. Please include a description of the company profile, including the range of the firm's capabilities and services. In addition, please provide the names of the Project Manager as well as all other personnel who will be specifically assigned to this project, including their qualifications, education, previous representative experience and their problem solving capabilities. All contemplated sub-consultants to be used during this assignment are required to provide the above requirements as well.
3. Please provide references for similar projects. Please include the telephone number and the name of each reference.
4. Please provide a schedule showing the time required for completion.
5. The City anticipates a total budget of approximately \$200,000 to complete the scope of work described herein. If the consultant proposes a fee in excess of this estimate, tasks should be identified that can be undertaken by City Staff to reduce the fee to within the City's anticipated budget.

#### **C. Deliverables and Timeline**

Deliverables include the draft(s) and final General Plan and CEQA documents, memos and other materials listed in the "Scope of Work" section. In addition to the original copies of all final documents, the consultant shall provide the following: 1) three (3) copies of the project schedule; 2) ten (10) copies of the Draft General Plan Update, including one (1) reproducible original and one (1) digital file; 3) ten (10) copies of the adopted General Plan Update, including one (1) reproducible original and one (1) digital file; and (3) three originals and (1) one digital copy of each document related to the environmental review. All documents and materials shall be prepared in Microsoft Office Word format. Regular updates of the documents shall also be provided to City Staff (electronic format is acceptable). All changes

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from the original draft shall be noted in underscore and strikethrough or "track changes". The City anticipates a 12-18 month schedule.

#### **D. Environmental Review**

The General Plan Update is subject to review under the California Environmental Quality Act (CEQA). The consultant will be responsible for preparation of an Initial Study to determine the appropriate project environmental review; options are a Mitigated Negative Declaration or Environmental Impact Report (EIR). The consultant shall demonstrate the ability to prepare the environmental review document in the Qualification Statement to the City of Oakley. The City expects that all aspects of the environmental review will be handled by the consultant team. If there are tasks that can be taken on by City Staff to reduce the overall project budget, then those recommendations should be incorporated into the response.

### **III. Qualifications Statement Requirements:**

Statement shall include the following:

1. Information demonstrating the Consultant's understanding of and approach to the project.
2. Information which demonstrated the Consultant's experience with the preparation of General Plan updates for cities similar in size and population as Oakley.
4. Identification of the personnel proposed on this project including the project manager, qualifications and experience on similar projects.
5. A detailed project schedule for the project including milestones and deliverables.
6. Specific comments on the City's Standard Consultant Services Agreement proposed for this project, a copy of which is attached. Proposals shall identify any exceptions taken by the Consultant regarding the terms, conditions and requirements of the City's Standard Agreement along with an explanation and suggested language for dealing with the exception. Unless exceptions are noted in the proposal, the selected Consultant will be expected to execute the City of Oakley's Standard Agreement as proposed. The Consultant's proposal will be referenced and included as an exhibit in the final Agreement executed with the City.

### **IV. Selection Process:**

Written proposals with qualification statements will be evaluated by the City of Oakley and may include an interview. Staff will make a recommendation on a Consultant to the Oakley City Council for approval and authorization to negotiate and execute an Agreement to provide the requested services. The City reserves the right to reject any and all proposals and to negotiate final contract terms with any selected consultant.

## **V. Background Information:**

### **City of Oakley Background Information**

Posted on the City of Oakley's web site ([www.ci.oakley.ca.us](http://www.ci.oakley.ca.us)) is a significant amount of background information including:

- City of Oakley 2020 General Plan
- City of Oakley 2020 General Plan Draft & Final EIR
- HCD Certified 2015-2023 Housing Element
- Zoning Ordinance (Title 9 of the Oakley Municipal Code)
- Downtown Specific Plan
- East Cypress Corridor Specific Plan

## **VI. Qualification Statement Deadline:**

Five (5) hard copies of the Proposal with a Statement of Qualifications must be submitted by no later than 5pm on February 9, 2019 to:

Joshua McMurray, Planning Manager  
City of Oakley  
3231 Main Street  
Oakley, CA 94561  
(925) 625-7004

## **VII. Attachments:**

1. Standard Consultant Services Agreement

Thank you in advance for your interest and response to the City of Oakley's Request for Proposal and Qualifications.