



**COUNTY OF EL DORADO
Procurement & Contracts**

ATTN: Purchasing Agent
360 Fair Lane
Placerville, CA 95667

REQUEST FOR PROPOSAL #14-918-088

DUE: 3:00 PM – June 27, 2014

Sealed Proposals must be clearly marked on the outside of the package with:
“RFP #14-918-088 MAILROOM DO NOT OPEN”

Purchasing Agent

**Major Update to West Slope Transportation Capital Improvement Program
and Traffic Impact Mitigation Fee Program**

El Dorado County's Community Development Agency, Long Range Planning (LRP) is soliciting a request for proposal for professional services from consulting firms with experience and expertise to assist the County with a major update to the West Slope Transportation Capital Improvement Program (CIP) and Traffic Impact Mitigation (TIM) Fee Program. Major updates to these programs are required to be completed every five years in support of El Dorado County's strategic General Plan implementation. The County's goals are to improve transportation infrastructure as needed, while lowering TIM Fees.

The successful Consultant Team will be highly qualified and experienced in developing and implementing similar programs, and will have a thorough knowledge and understanding of local and regional TIM Fee Programs in the greater Sacramento area. Consultant Team shall provide examples of past successful efforts to demonstrate its completion of similar projects. To avoid potential conflicts of interest, the successful Consultant Team will not simultaneously work on current developer driven projects in El Dorado County, and will not accept any developer driven (discretionary) projects until the adoption of the updated CIP and TIM Fee Program.

This request for proposal (RFP) defines the scope of services and outlines the requirements that must be met by Proposers interested in providing such services. **Proposers are advised to read all sections of this RFP prior to submitting a proposal.**

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- I. **Background:** El Dorado County is located in Northern California and is bordered by Sacramento, Placer, Amador and Alpine counties in California, and Douglas County, Nevada. The two incorporated Cities in El Dorado County are Placerville and South Lake Tahoe. In the 2000 census, El Dorado County's population was determined to be 156,299. El Dorado County's population is projected to reach 243,000 by 2025, an increase of over 80,000 new residents.

In order to maintain the integrity of the County's transportation network, the County implements General Plan Policy TC-Xb and Implementation Measures TC-A and TC-B. These measures require the development of a 10- and 20-Year CIP as well as a 20-Year TIM Fee Program, which require major updates every five years. The TIM Fee Program update must demonstrate nexus requirements per Assembly Bill 1600 (California Government Code Sections 66000-69000).

LRP has recently completed an update to the El Dorado County Travel Demand Model (TDM) which includes a new 2010 baseline. LRP has also received direction on a starting point for a future growth and distribution through 2035 to determine roadway infrastructure needs.

The updated transportation infrastructure needs will be used for both the major CIP and TIM Fee Program updates. The analysis of the transportation infrastructure needs will result in a minimum of five primary documents for the use of County staff and the public. These five documents include:

1. 2015 West Slope Transportation CIP
2. Existing Deficiencies report
3. 2004 El Dorado County General Plan TIM Fee 2015 Update
4. Nexus Study
5. Environmental Document(s)

The TIM Fee update shall include the total cost of required improvements and a calculation of the total new construction and TIM Fee revenue based on land use projections. Costs attributable to future development will be determined, and cost allocation factors shall be reviewed and evaluated by the Consultant Team and County staff. A nexus between unfunded improvement costs and projected future development shall be created, and impact fees will be calculated.

Project Team

The selected Consultant Team can consist of a single firm that has the capabilities to perform all functions, or a primary Consultant Team with a team of subconsultants (Consultant Team).

The Project Team includes Consultant Team, El Dorado County staff that will perform the program oversight, a technical project development team (PDT) and an external working group(s) as designated by the County. The PDT and external working group(s) will not be involved in all meetings or tasks.

II. Scope of Services: The successful Proposer will be required to enter into a three (3) year Agreement for services with the County substantially similar in form to that attached hereto as Exhibit "A," marked "Sample Agreement for Services." Any reference in this Request for Proposal to specific terms of the Agreement are for illustrative purposes only and shall not limit the scope of the obligations to be assumed by the successful Proposer under the Agreement. In the event of any conflict between a provision of this Request for Proposal and the provisions of the Agreement attached as Exhibit "A," the terms of the Agreement shall govern. The Consultant Team may respond to this RFP with changes to components and/or tasks required to provide clarity and efficiency. Changes may include the addition, removal, or redefining of a task. Any proposed changes require an appropriate justification. The Services to be provided shall include, but are not limited to, the following:

A. Summary of Services

The preliminary scope of services for this project by task is described below. "Meetings" refer to meetings with the PDT and designated external working group(s) and/or meetings with staff as well as appearances before the Planning Commission and the El Dorado County Board of Supervisors (Board). In addition to the meetings specifically referenced below for each Task, Consultant Team shall meet at least every two weeks during the term of this Agreement with the project team and County staff. "Deliverables" list specific Consultant Team deliverables associated with each task.

The County will retain the Consultant Team under an Agreement to ensure that the project is delivered on time, within budget and of the expected quality. In addition, Consultant Team must be able to lead the public and stakeholder outreach process so that the parties of interest understand that they have been given an opportunity to affect the outcome based on their participation. The purposes of this project are: (1) to design and carry out a community-based facilitated dialogue to examine issues related to transportation needs, traffic mitigation and public finance consistent with the policies of the County; (2) to oversee and coordinate the work effort to update the CIP and TIM Fee Program on schedule as agreed upon by the Consultant Team and the County staff; and (3) recommend the updated draft programs to the Board for approval.

Consultant Team shall be required to provide all labor, equipment, tools and facilities necessary for the completion of the update and revision to the West Slope Roadway CIP and TIM Fee Program. The completed final technical reports, including the CIP, TIM Fee Program, Nexus Study, environmental document(s), and ordinance and/or resolution revisions are anticipated to be presented to the Board on or before twelve (12) months from issuance of the Notice to Proceed.

B. Outline of Services

The following is a basic outline to be used in developing the scope of work that will be prepared as part of the proposal. The scope of services is divided into three components (further detail is provided under Scope of Services):

1. Component 1 - Project Management

Deliverables include:

- Project schedule
- Coordination of meetings
- Public outreach

2. Component 2 - Traffic Analysis

Deliverables include:

- Traffic Analysis required for the updates to the TIM Fee Program, West Slope Roadway CIP, nexus study and environmental document as needed for Component 3
- TIM Fee Zone review

3. Component 3 - Economic/Financial Analysis

Deliverables include:

- Research on best practices relating to TIM Fee Programs
- Establishment of parameters for TIM Fee Program
- Establishing TIM Fee Categories and TIM Fee Zones
- Cost estimates for multimodal transportation improvements
- Identification of funding sources for 10- and 20-year CIP projects
- Creation of West Slope Roadway CIP program
- Existing deficiencies report
- Environmental document
- TIM Fee report and required documents for Board adoption

4. Summary of Meetings

The contract is anticipated to run approximately 12 months. The first two months are anticipated to contain meetings associated with traffic data collection, collection of historical information, and the establishment of the County designated external working group(s). For the following months, the Consultant Team should anticipate meeting with County staff, the PDT any external working group(s) designated by the County. Consultant Team shall attend Board meetings for workshop or action items to obtain direction as needed.

The meetings as described in the Component descriptions below are summarized as follows and provided in further detail in Scope of Services:

| No. of Meetings | Meeting Type/Description | Participants | Task No. |
|------------------------|-----------------------------------|--|-----------------|
| 1 | Kick Off | Project Team | 1.1 |
| As needed | Consultant Team meeting | Consultant Team | 1.2.4 |
| As needed | Meetings with Stakeholders/public | To be determined (could be LRP staff with specific members of Consultant Team) | 1.2.8 |
| Bi-Weekly | Project Status | Project Team | 1.2.11 |

| No. of Meetings | Meeting Type/Description | Participants | Task No. |
|-----------------|--|---|----------|
| 1 | Planning Commission Presentation to discuss final CIP & TIM Fee Programs | LRP Staff, Consultant Team members to be determined | 1.3 |
| 8 | Board Hearings to discuss roadway infrastructure results | LRP Staff, Consultant Team members to be determined | 1.3, 2.4 |
| 2 | Board Hearings to finalize roadway infrastructure results | LRP Staff, Consultant Team members to be determined | 1.3, 2.4 |
| 4 | Community meetings to discuss progress and Final CIP and TIM Fee updates | LRP Staff, Consultant Team members to be determined | 1.3 |
| 2 | Meeting to discuss existing TIM Fee Zones | Project Team | 2.3 |
| 2 | Two Board meetings to determine TIM Fee Zones | LRP Staff, Consultant Team members to be determined | 2.3 |
| 1 | Discussion of TIM Fee Program components | Project Team | 2.5 |
| 2 | Discussion of TIM Fee Program Parameters | Project Team | 3.2 |
| 10 | Discussion of TIM Fee components related to deferral program, appeal process, etc. | Project Team | 3.3 |
| 1 | Community Meeting to discuss Environmental Document | LRP Staff, Consultant Team members to be determined | 3.9 |
| 2 | Board meetings to finalize CIP and TIM Fee Programs for adoption | LRP Staff, Consultant Team members to be determined | 3.10 |

C. Scope of Work

Services shall include, but are not limited to, the following:

COMPONENT 1 - Project Management and Facilitation Component

Task 1.1: Preliminary Work

Immediately after contract award, Consultant Team shall meet with Long Range Planning (LRP) staff to refine work plan details, tasks for and deliverables by the Consultant Team and LRP and their timing, and overall project schedule.

Deliverables:

- Draft Memorandum 1-1: Summary of kick-off meeting
- Final Memorandum 1-1: Summary of kick-off meeting
- Schedule describing tasks, milestones, deliverables

Task 1.2: Project Management and Administration

1. Under the direction of the Contract Administrator (CA) or designee, coordinate and monitor the work of any subconsultants.
2. Provide bi-weekly written reports to the CA or designee, on program status, critical and time-sensitive issues and budget.
3. As requested by the CA or designee, provide other deliverables, including status reports, summaries, projections, recommendations and other documents required by the services to be provided under this Agreement.
4. Create agendas and attend and facilitate meetings, as needed to ensure that project subconsultants remain on task, on time and on budget.
5. Prepare meeting notes for distribution to participants that outline the body of the dialogue that took place, work assignments and deliverables agreed upon, outstanding issues, and time-critical decisions.
6. Prepare reports for use in staff presentations to Boards, Commissions and stakeholders.
7. Prepare and make public presentations, at all levels, of the program progress and results as requested by and in coordination with direction from the CA or designee.
8. Schedule meetings, as directed by the CA or designee, with subconsultants, County staff, the public and stakeholders at critical points in the process and lead, facilitate and mediate these meetings.
9. Under the direction of the CA or designee, act as County's Project Manager and facilitator, with the authority to task Consultant Teams on deliverables for presentations, the format and content of final reports and interim support documents.
10. County to provide meeting space and scheduling as required.
11. Schedule bi-weekly project status meetings/telephone conferences with County staff as needed. Consultant Team shall also prepare e-mail summaries of the kick-off meetings and bi-weekly project status meetings.

Deliverables:

- Project schedule with monthly updates
- Monthly progress reports and invoices
- Agendas for meetings
- Summaries of each meeting's decisions and discussions
- Reports as needed for Presentations as defined Task 1.2.6
- Draft Presentation Materials
- Final Presentation Materials

Task 1.3: Public Outreach

Consultant Team shall provide outreach to facilitate and mediate meetings with stakeholder groups to review governing assumptions in advance of extensive traffic model runs and analysis with the goal of consensus building and mutual understanding of the policies involved. Consultant Team shall ensure that all interests are heard, and that the widest possible range of concerns from stakeholders is considered.

Deliverables:

- The Consultant Team shall attend and present findings at a minimum of sixteen (16) meetings. The dates of all public outreach shall be coordinated with the CA or designee. The public outreach meetings include:
 - One (1) Planning Commission meeting
 - One (1) El Dorado County Transportation Commission meeting
 - Up to ten (10) Board workshops
 - Up to eight (8) Board workshops shall be prior to finalizing a draft CIP and TIM Fee Program to obtain input on required roadway infrastructure requirements as needed through 2035
 - Up to two (2) additional Board presentations shall be used in the adoption of the CIP and TIM Fee Program Updates
- Up to four (4) public outreach meetings in the communities. Dates and locations to be coordinated with the CA or designee.
- Handouts and presentation materials shall be prepared by the Consultant Team for all public outreach meetings, Planning Commission Meeting, and Board presentations.

Task 1.4: Invoicing, Reporting, Project Administration

The Consultant Team shall prepare monthly reports and invoices for deliverables completed in the preceding calendar month before the 15th day of each month.

Deliverables:

- Monthly invoices
- Monthly progress reports

COMPONENT 2: TRAFFIC ANALYSIS

Task 2.1: Data Collection and Model Output

Consultant Team shall collect available traffic count and land use data from County for use in the analysis to determine existing deficiencies and for the major updates of the West Slope Roadway CIP and TIM Fee Program. The data shall also be used for the TIM Fee Program Nexus Study. The nexus analysis will be based on the incremental land use growth projected to occur in County between January 1, 2010 and January 1, 2035. The data needed for the traffic component of the nexus analysis is listed below. This data will be provided to County staff and the economic/financial Consultant Team for this project.

- 2015 and 2035 a.m. and p.m. peak hour roadway segment volume forecasts for the major roadways included in the El Dorado County Roadway Network.
- Incremental residential and non-residential land use growth estimated to occur between December 31, 2010 and December 31, 2014 by traffic analysis zone (TAZ) and in the variables used by the El Dorado County General Plan TDM.
- Projected incremental residential and non-residential land use growth forecasted to occur between January 1, 2015 and December 31, 2035 by TAZ and in the variables used by the El Dorado County General Plan TDM.
- Projected incremental residential and non-residential land use growth forecasted to occur between January 1, 2015 and January 1, 2025 by TAZ and in the variables used by the El Dorado County General Plan TDM.

All data will be provided in Excel spreadsheet format. Consultant Team shall provide the input spreadsheets and assist with potential “unit” conversions for non-residential land uses. For example, County’s data may only include building square footage where the model uses the number of employees. Where these differences occur, Consultant Team shall provide input on appropriate conversion factors for employees to square feet of use.

Deliverables:

- Traffic Consultant Team will provide an electronic copy in Excel spreadsheet format of the final land use spreadsheets to County and Economic/Fiscal Consultant Team for use in Component 3
- Draft Memorandum 1-2: Summary of methodology and conversion factors
- Final Memorandum 1-2: Summary of methodology and conversion factors

Task 2.2: Environmental Document

Traffic Consultant Team shall perform all professional and technical services, work, and tasks required by Economic/Fiscal Consultant Team in preparation of environmental document as required in Component 3.

Deliverables:

- Assist in preparation of draft environmental document (includes response to up to three (3) sets of comments)
- Assist in preparation of final environmental document

Task 2.3: Determination of Appropriateness of TIM Fee Zones

Consultant Team shall work with the project team to develop a flexible modeling method that allows quick testing to determine if Fee Program or TIM Fee Zone changes are required. This change will require programming work in a format compatible with CUBE modeling software and Excel. The programming will provide the TIM Fee Zone to Traffic Analysis Zone (TAZ) equivalency needed to extract select link results from the TDM, while the Excel programming will involve modifying the Roadway Capacity Analysis Tool (RCAT) provided by the County to evaluate roadway segment Level of Service (LOS) and to produce the TIM Fee Zone traffic volume contribution estimates by roadway segment.

As part of this task, Consultant Team shall prepare Geographical Information System (GIS) maps of the final TIM Fee Zone boundaries. The GIS maps will include land use summaries by TIM Fee Zone based on the land use estimates and forecasts provided by County for 2025 and 2035 conditions.

Deliverables:

- Up to four (4) meetings to include:
 - Up to two (2) meetings with Project Team to discuss the TIM Fee Zones
 - Up to two (2) Board presentations to adopt changes to TIM Fee Zones (if required)
- Consultant Team shall provide one (1) draft electronic copy and up to twenty-five (25) draft hard copies of the 2025 and 2035 GIS maps per iteration (up to 3)
- Consultant Team shall provide one (1) final electronic copy and up to twenty-five (25) final hard copies of the 2025 and 2035 GIS maps.

Task 2.4: Travel Demand Model Runs & Preliminary Roadway Improvements

Consultant Team shall conduct TDM runs for 2025 and 2035 conditions based on the updated land use information from County staff. The new model runs will include a.m. and p.m. peak traffic volume forecasts, and will be performed iteratively (up to 10 iterations) to identify the needed roadway improvements for 2025 and 2035 conditions based on the General Plan LOS policy.

For each iteration run, distribution to housing and employment may be modified based on Board and staff input. Consultant Team shall calculate the a.m. and p.m. peak hour LOS for the selected segments of the County's major roadway system included in the TIM Fee Program using the RCAT post-processor. Based on the LOS results, Consultant Team shall develop a preliminary system of roadway improvements for 2025 and 2035 conditions for review by County staff. After review by County staff, Consultant Team shall prepare information for Board presentation. This process will be completed for up to ten (10) Board presentations prior to finalizing the roadway network. Upon Board authorization to finalize, Consultant Team shall conduct one (1) additional set of runs to finalize the roadway improvements and then generate final travel demand output for the nexus analysis. Consultant Team shall also provide the Vehicle Miles Traveled (VMT) and Vehicle Hours Traveled (VHT) for the roadway system for each run.

The travel demand model outputs will include the following a.m. and p.m. peak hour data for each roadway segment in the Fee Program under 2025 and 2035 conditions.

- Volume Forecasts
- LOS
- Trip contribution (as a percentage) from new development between 2025 and 2035 by TIM Fee Zone.

This information will be used to determine the preliminary fair-share cost contribution from each district for the Fee Program's selected improvements as well as a preliminary list of potential existing deficiencies.

Deliverables:

- Up to ten (10) Board Presentations
- Eight (8) Board Presentations to discuss roadway infrastructure results
- Two (2) Board Presentations in finalizing the CIP and TIM Fee programs
- One (1) electronic copy and up to five (5) bound copies of the roadway LOS results for the preliminary system of roadway improvements for 2025 and 2035 conditions per Board Presentation – Up to ten (10) iterations
- One (1) electronic copy and up to twenty-five (25) bound copies of a technical memorandum containing the final travel demand output noted above as well as the preliminary list of existing deficiencies and the preliminary fair-share cost contributions

Task 2.5: Traffic Impact Fee Estimate

Traffic Consultant Team shall assist the Economic/Fiscal Consultant Team on how to calculate the fee estimate by TIM Fee Zone to capture the effects of potential program credits to the retail, service, or other non-residential land use categories. Consultant Team shall provide input regarding potential methods to establish a Dwelling Unit Equivalent or similar metric to reflect variations due to dwelling unit size, affordability level, or type of occupant (i.e., senior housing). Consultant Team shall also include the analysis of the creation of categories such as Mixed-Use.

Deliverables

- One (1) meeting with Project Team to discuss potential TIM Fee Categories such as Mixed-Use
- Draft Memorandum 2-1: Establishment of a Dwelling Unit Equivalent (or similar metric)
- Final Memorandum 2-1: Establishment of a Dwelling Unit Equivalent (or similar metric)
- Draft Memorandum 2-2: Recommendations on how to calculate fee estimates to capture the effects of potential program credits to all categories
- Final Memorandum 2-2: Recommendations on how to calculate fee estimates to capture the effects of potential program credits to all categories
- Draft Memorandum 2-3: Draft TIM Fee Categories
- Final Memorandum 2-3: Final TIM Fee Categories

Task 2.6: Identify CIP and TIM Fee Program Projects

The Consultant Team shall assist LRP in defining the transportation infrastructure needs as a result of the projected growth through 2035 as well as the identification of existing deficiencies. The roadway infrastructure improvements shall be based on LOS as defined by the El Dorado County General Plan and El Dorado County design standards.

Deliverables:

- Draft Memorandum 2-3: Identification of:
 - Existing roadway deficiencies

- Transportation Improvements needed as a result of future development. These improvements shall be described as to timing of requirement (i.e., 2015, 2025 and 2035)
- GIS Mapping and Excel Spreadsheets with breakdown of information
- Up to ten (10) iterations of projects needed through 2035
- Final Memorandum 2-3: Identification of:
 - Existing roadway deficiencies
 - Transportation Improvements as a result of development. These improvements shall be described as to timing of requirement (i.e., 2015, 2025 and 2035)
 - GIS Mapping and Excel Spreadsheets with breakdown of information

Task 2.7: Invoicing, Reporting, Project Administration

The Consultant Team shall prepare monthly reports and invoices for deliverables completed in the preceding calendar month before the 15th day of each month.

In addition to preparing invoices and monthly reporting, the Consultant Team shall participate in bi-monthly phone calls with the Project Manager to ensure regular communication and project integrity. Consultant Team shall be available for any in-person meetings as requested by the Project Manager, subject to availability.

Deliverables:

- Monthly invoices
- Monthly progress reports

COMPONENT 3: ECONOMIC/FISCAL ANALYSIS

Task 3.1: Research and Analysis

Consultant Team shall perform the following:

1. Research best practices and industry standards used by similar agencies for developing TIM Fee Programs.
2. Analysis of current interpretation of TIM Fee Program, how El Dorado County applies it, and identification of issues staff currently deals with on a daily basis (i.e., different TIM Fees collected by category, how fees are interpreted by staff, etc.).
3. Ensure that the proposed TIM Fee system covers the probable distribution of trips on a statistical basis over the entire network.

Deliverables:

- Draft Memorandum 3-1: Summary of TIM Fee Industry standards by other agencies including a summary of fee program of similar agencies
- Final Memorandum 3-1: Summary of TIM Fee Industry standards by other agencies including a summary of fee program of similar agencies
- Draft Memorandum 3-2: Summary of current use of TIM Fees and identified issues

- Final Memorandum 3-2: Summary of current use of TIM Fees and identified issues

Task 3.2: Develop Policy and Technical Parameters

Consultant Team shall gain staff level agreement on project parameters, including:

- Trip basis (average daily or peak hour) and trip generation rates
- Analysis of current interpretation of fees, how they are applied by El Dorado County, and identification of issues staff currently deals with on a daily basis (i.e., occupancy type)
- Analysis of TIM Fee categories and review of financial impacts in creation of new categories such as Mixed-Use (from Task 2.5)
- Identification of policy determinations regarding improvement cost components, including right-of-way, frontage improvements, environmental mitigation, and financing
- Role of transit and other alternative modes in reducing congestion
- Geographic fee zones
- Method for determining existing deficiencies
- Treatment of Tahoe area
- Interpretation of General Plan policy TC-Xa and concurrent TC-X Policies, including LOS policies
- Allocation of cost burden between and within residential and non-residential land uses
- TIM Fee reimbursement guidelines

Deliverables:

- Up to two (2) meetings with Project Team
- Draft Memorandum 3-3: Summary of Project Parameters
- Final Memorandum 3-3: Summary of Project Parameters

Task 3.3: Cost Allocation

Consultant Team shall perform the following:

1. Determine Costs Attributable to Future Development: Develop a methodology for each fee component to identify existing deficiencies of current roads and improvements and assist County staff in determining the portion of estimated cost that is attributable to new development versus existing deficiencies.
2. Evaluate Current Allocation Factors and Recommend Alternate Methods: Review and evaluate the allocation factors used for the existing fees and provide recommended alternatives consistent with current TIM Fee best management practices.
3. Fee Analysis: Identify funding for existing deficiencies and engage in discussions with Project Team regarding possible solutions and alternatives. Traffic Consultant shall provide allocation of capital project costs by geographic zone based on select link analysis. Determine new development responsibility for planned improvements, including subdivisions that are smaller than five units.

Determine geographic zones. Determine responsibility for improvements associated with certain future trip generation (i.e. development with existing entitlements, new public facilities and external-external trips). Determine basis for allocating costs to new development (i.e. per dwelling unit or building square foot, number of land use types, etc.) and calculate fee schedules.

4. Review Guidelines, Procedures & Agreements: Review El Dorado County's existing and proposed TIM Fee guidelines, procedures and agreements, and shall provide recommendations for improvements, alternatives or modifications consistent with County's 10- and 20-Year CIPs.
5. Review TIM Fee Categories and provide recommendations on updating and revising the TIM Fee Categories where feasible and consistent with current standards of practice.
6. Capital Financing Plan: Assume that the only financing mechanism is that provided by developers through the reimbursement program. Integrate existing TIM program fund balances and project commitments. Prepare financing plan based on project fee revenues, other revenues, and phasing of capital projects.
7. Develop three (3) alternative approaches to fee analysis and conduct three (3) iterations of each. Variables to be considered include:
 - Geographic zones
 - Land-use categories
 - Trip rate adjustments for pass-by and diverted trips, trip length, and trip responsibility (shifting burden between origins and destinations)

Deliverables:

- Up to ten (10) meetings with County staff. Meetings may include Project Team as needed
- Draft Memorandum 3-4: Summary of assumptions and approach, with accompanying tables showing results (fee schedule and 10- and 20-Year financing plan) of each alternative, including findings and recommendations based on the review of County's existing TIM Fee guidelines, procedures and agreements. Produce initial memorandum and two revisions, if necessary, based on feedback from staff.
- Final Memorandum 3-4: Summary of assumptions and approach with accompanying tables showing results (fee schedule and 10- and 20-Year financing plan) of each alternative, including findings and recommendations based on the review of County's existing TIM Fee guidelines, procedures and agreements. Produce initial memorandum and two revisions, if necessary, based on feedback from staff.
- Draft Memorandum 3-5: TIM Fee Categories
- Final Memorandum 3-5: TIM Fee Categories
- Draft Memorandum 3-6: Updated TIM Fee Deferral Program for Residential and Non-Residential
- Final Memorandum 3-6: Updated TIM Fee Deferral Program for Residential and Non-Residential

- Draft Memorandum 3-7: TIM Fee Appeal Process Document
- Final Memorandum 3-7: TIM Fee Appeal Process Document

Task 3.4: Develop Roadway Improvement Cost Estimates

The Consultant Team shall, in cooperation with LRP, develop preliminary cost estimates for the updated list of potential CIP projects and a TIM Fee Program required to meet General Plan defined LOS standards. A clear distinction shall be made on projects that shall be considered for the TIM Fee Program, as well as required CIP projects which are existing deficiencies. The cost estimates will include a brief project description with the type, name, location, size or quantity, construction cost, land cost, contingency assumptions, and total cost specified for each. Consultant Team shall review the cost estimates to ensure they are realistic and are consistent with the latest industry standards of practice. Cost estimates for the life cycle costs of County roads and other transportation facilities may also be included in the capital cost estimates. Consultant Team shall assist LRP staff in estimating these costs.

Task 3.5: Identify Funding Requirements and Sources

Consultant Team shall match the capital improvements described above with their anticipated or expected funding sources. Consultant Team, in consultation with LRP, shall identify all other “discretionary” transportation funding sources, including Federal, State, and local funds. The total discretionary and non-discretionary funding amounts will be deducted from the total of the cost estimates to determine the net funding gap for purposes of the TIM Fee Program calculation.

Revenues from the previous TIM Fee Program or developer contribution requirements will likely be considered part of the funding pool and will be deducted from the total TIM Fee Program cost estimates. It will be necessary to avoid “double-charging” for individual improvement projects.

Deliverables:

- Draft Memorandum 3-8: Cost and Funding Alternatives Memorandum
- Final Memorandum 3-8: Cost and Funding Alternatives Memorandum

Task 3.6: West Slope Roadway Capital Improvement Program Report

Consultant Team shall prepare a West Slope Roadway CIP, which specifies the transportation facility improvements that are proposed to be funded, all or in part, by the TIM Fee Program, as well as specify the transportation facility improvements which are existing deficiencies, and therefore not eligible to use TIM Fees. Consultant Team shall document the CIP in an infrastructure cost database, in spreadsheet format, that will be directly linked to the cost allocation model and fee schedule described below. The infrastructure cost database will include project type, name, location, size or quantity, cost, and non-fee funding sources.

Deliverables:

- Database including CIP projects, descriptions, funding
- Draft West Slope Roadway Capital Improvement Program Report
- Final West Slope Roadway Capital Improvement Program Report

Task 3.7: Existing Deficiencies Report

Consultant Team shall prepare a report identifying the existing roadway deficiencies which existed prior to the 2004 General Plan TIM Fee Program. The report will include the list of roadways and identify the required improvements and costs.

Deliverables:

- Existing Deficiencies Report

Task 3.8: Develop Nexus and Calculate Impact Fees

Consultant Team shall develop a model to create the nexus between unfunded improvement costs and projected future development based on the allocation factors identified in Task 2. The model should be designed to easily allow County staff or policymakers to refine the included roads or allocation factors at any point during the public outreach and approval process. In addition, the model should take into account existing infrastructure deficiencies and any existing funding sources that would augment the Fee Program.

Consultant Team shall include in the Nexus Study report detailed methodologies for the ongoing administration of the program, including annual fee adjustments, periodic reviews of the program and program implementation. Consultant Team shall respond to up to three (3) sets of comments prior to finalizing the Nexus Study.

Deliverables:

- Draft Nexus Study
- Final Nexus Study

Task 3.9: Environmental Document

Consultant Team shall perform all professional and technical services, work, and tasks required for completion of an environmental document as needed for the CIP and/or TIM Fee updates. Consultant Team shall prepare a legally and technically adequate environmental document, for certification by the Board. Consultant Team shall complete a draft environmental document, respond to public comments on that document, and facilitate the public meeting during the public review period. Consultant Team shall prepare a final environmental document based on responses to comments. Consultant Team shall respond to up to three (3) sets of comments prior to finalizing the environmental document.

Deliverables:

- Schedules in MS Project
- Tracking tables in Excel
- Additional monthly invoice reports with progress summaries
- Preparation of draft environmental document
- Preparation of final environmental document
- One (1) public meeting to discuss environmental document

Task 3.10: Produce and Present Draft and Final Reports for TIM Fee Update

The Consultant Team shall prepare an Administrative draft, Public Draft and Final Draft TIM Fee report detailing the improvement costs, cost allocation methodology, nexus relationship, and the resulting recommended development impact fees, along with any other information and/or analysis required pursuant to General Plan Policies and Implementation Measures and/or other applicable laws.

The Administrative Draft will be reviewed by staff prior to being released for public review. The Public Draft will incorporate Project Team's comments on the Administrative Draft. The County will develop an appropriate distribution list and circulate electronic versions of the Draft TIM Fee Plan to the public and applicable agencies, stakeholders and interest groups for public review.

Chapter 1: Executive Summary

Provide a brief overview of General Plan Policy TC-Xa and the concurrent TC-X policies and the nexus concept. Describe major tasks accomplished in the study and major recommendations.

Chapter 2: Existing, Near-Term and Future Deficiencies and Peak Hour Trips

Identify performance standards to determine whether roadways will operate with deficiencies. Identify volume/capacity methodology for each facility type. Describe transportation forecasting methodology. It is anticipated that the TDM will provide the basis for this information.

Chapter 3: Project List and Cost Estimates

List and describe a classification for each improvement, such as: roadways, intersections, sidewalks, bicycle lane projects, traffic calming projects, transit service improvement projects, and ongoing administrative costs for transportation monitoring programs (i.e., traffic model update costs, traffic study guideline updates and Circulation Element updates. Identify the cost anticipated for each improvement classification.

Chapter 4: Program Costs and Fee Calculation

Explain the recommendations for impact fee amounts and their basis, and provide a description of the methodology used in their calculation. Identify a specific fee amount for the following land use types: Multi-family Dwellings (MFD), Single Family Dwellings (SFD), Age-restricted MFD, Age-restricted SFD, High-Trip Commercial, General Commercial, Office, Industrial, Warehouse, Churches and Gas Stations.

Chapter 5: Nexus Findings

Explain how fees meet or exceed the basic requirements set forth in the General Plan and provide an overview of the Nexus Study as required as part of Task 3.6.

Chapter 6: Recommended Changes to TIM Fees

Identify best practices in TIM fees that recent programs include, but are lacking in the County's TIM fee program.

Appendix A – Policy TC-Xa and Concurrent TC-X Policies
Appendix B – Existing and future land uses by TAZ Zone
Appendix C – Traffic Forecast Details
Appendix D – Detailed Cost Estimates

Consultant Team shall integrate comments from the Project Team and produce public draft report for Board review. Integrate Board comments and produce final adopted report. Consultant Team shall respond to up to three (3) sets of comments prior to finalizing.

Consultant Team shall separately provide spreadsheet model to County to update fees annually for cost inflation and adjust capital financing plan. Consultant Team shall respond to up to three (3) sets of comments prior to finalizing.

Deliverables:

- Two (2) Board meetings or public hearings
- Draft spreadsheet model
- Final spreadsheet model
- Administrative Draft of TIM Fee Report
- Final Draft of TIM Fee Report
- Draft Resolution for Board Adoption
- Final Resolution for Board Adoption
- Coordination with Media for Required Public Notice

Task 3.11: Produce Administrative Procedures Manual

Consultant Team shall produce an Administrative Procedures Manual to assist County staff in implementing the various facets of the revised TIM policy and conditions. The Manual will communicate the various aspects of the TIM policy as procedures to clarify implementation for County staff and the public. The Manual will address, for example:

1. Developer reimbursements and credits
2. Land use definitions
3. Exemptions and waivers
4. Appeals process
5. Reporting requirements, including contents of annual and five-year statutory reports
6. Milestones for updating program

Deliverables:

- Two (2) meetings with Project Team to review document
- Administrative draft Procedures Manual. Consultant Team shall respond up to three (3) sets of comments
- Final Administrative Procedures Manual

Task 3.12: Invoicing, Reporting, Project Administration

The Consultant Team shall prepare monthly reports and invoices for deliverables completed in the preceding calendar month before the 15th day of each month.

In addition to preparing invoices and monthly reporting, the Consultant Team shall participate in bi-monthly phone calls with the Project Manager to ensure regular communication and project integrity. Consultant Team shall be available for any in-person meetings as requested by the Project Manager, subject to availability.

Deliverables:

- Monthly invoices
- Monthly progress reports

Documents Available for Review

- <http://www.edcgov.us/Government/DOT/TIM/TIMFeeProgram.aspx>
- <http://www.edcgov.us/Government/DOT/TIM/2006/TIMFees2006.aspx#ProgramDocumentation>
- <http://www.edcgov.us/Government/DOT/CIP.aspx>
- http://www.edcgov.us/Government/Planning/Adopted_General_Plan.aspx

III. Proposal Content: Proposal responses must adhere to the requirements set forth in this section, both for content and sequence. Failure to adhere to these requirements or the inclusion of conditions, limitations or misrepresentations may be cause for rejection of the submittal. Use 8-1/2 x 11 sheets (foldouts are acceptable for charts, etc.) and font size large enough to be easily legible, but not smaller than 10 point. The original proposal and each subsequent copy must be submitted on paper, properly bound, appropriately tabbed and labeled in the following order:

- A. Cover letter:** Provide a “cover Letter” and introduction, including the name and address of the organization or individual submitting the proposal, together with the name, address, telephone and fax numbers, and e-mail address of the contact person who will be authorized to make representations for the organization, and an expression of the Proposer’s ability and desire to meet the requirements of this Request for Proposal, including acceptance of the standard contract terms in Exhibit “C”. **The letter must be signed by an individual authorized to bind the firm contractually.**
- B. Table of Contents:** This section shall include a detailed “Table of Contents” and an outline of the submittal, identified by sequential page number and by section reference number and section title as described herein.
- C. Background and Experience:** Describe the firm’s background, its organizational structure, length of time in business, and experience in providing the type of services solicited herein.
- D. Detailed Discussion and Work Plan:** Provide a narrative of the Proposer’s assessment of the work to be performed. This section should clearly demonstrate the Proposer’s ability to perform the scope of services. Discuss each item in **Section II. – Scope of Services** and describe how your firm will accomplish the desired scope of work. Include the names and resumes of key staff and explain how the firm’s team intends to approach this project.

- E. Insurance Requirements:** A written statement of your firm's ability to comply with the insurance requirements set forth in Exhibit "C".
- F. References:** Proposers must provide a minimum of three (3) client references, preferably of county governments, municipalities, or service districts in California, of organizations with whom you currently have contracts with and/or have previously had contracts with for the provision of services of equal type and scope within the last five (5) years. Each reference shall include company or organization name, contact person, title, telephone number, length of business relationship, and summary of services performed.
- G. Additional Data:** (this Section shall be limited to five pages) Include any other data the Proposer deems essential. Where appropriate, please key data back to information contained in Sections A thru G.

IV. Proposers' Questions: Questions regarding this RFP must be submitted in writing to the Procurement and Contracts Office and must be received no later than **5:00 p.m.– on May 30, 2014**. All envelopes or containers must be clearly labeled "**RFP #14-918-088, QUESTION**" for convenience purposes. Envelopes or containers not clearly labeled may be overlooked and not responded to. Questions will **not** be accepted by telephone, facsimile (fax), electronically, or orally. The County reserves the right to decline a response to any question if, in the County's assessment, the information cannot be obtained and shared with all potential organizations in a timely manner. A summary of the questions submitted, including responses deemed relevant and appropriate by the County, will be posted on the Procurement and Contracts website on or about **June 6, 2014**. All inquiries shall be submitted by U.S. mail to:

Procurement and Contracts
360 Fair Lane
Placerville, California 95667
RFP #14-918-088 Question

Proposers are cautioned that they are not to rely upon any oral statements that they may have obtained. Proposers shall direct all inquiries to the County Purchasing Agent and shall not contact the requesting department directly regarding any matter related to this Request for Proposal.

V. Proposal Submittal: Proposers must submit one (1) original and five (5) copies of their proposal, along with any addenda, in a sealed envelope or container, clearly marked "**RFP #14-918-088– MAILROOM DO NOT OPEN**", **no later than 3:00 p.m. – June 27, 2014**, to:

County of El Dorado
Procurement and Contracts
360 Fair Lane
Placerville, CA 95667

A Proposer may withdraw its final proposal at any time **prior** to the opening deadline date and time by submitting a written request for its withdrawal to the County Purchasing Agent, signed by an authorized agent of the firm. Proposers may thereafter submit a new or modified proposal **prior** to the opening deadline date and time. Modifications offered in any manner, oral or written, will not be considered.

Proposers submitting less than the required number of copies of their proposal will be rejected and considered “non-responsive.” Proposals received beyond the deadline will not be considered, and will be returned unopened.

It is the responsibility of the Proposer to assure that the proposal is received in the Procurement and Contracts Division prior to the proposal opening deadline date and time. Proposals received beyond the proposal opening deadline will not be accepted and will be returned unopened. The time stamp clock located in the office of the Procurement and Contracts Division will serve as the official time clock.

For questions regarding the Request for Proposal process, contact Sue Hennike at (530) 621-5577.

- VI. Public Records Act:** All proposals shall become public information at the conclusion of the selection process, with the exception of those portions of a proposal that are identified at the time of submittal by the Proposer as trade secrets and/or which are deemed by the County as not being public documents that must disclosed under the Public Records Act, or other appropriate statutes and regulations. Pricing and service elements of the successful proposal will not be considered proprietary information. Proprietary information shall be submitted in a separate sealed envelope clearly labeled as proprietary with the RFP number on the outside of the envelope. All materials submitted in response to this Request for Proposal shall become the property of the County and will not be returned.
- VII. Valid Offer:** Proposals shall remain valid for 120 days from the due date. The County reserves the right to negotiate with the successful Proposer any additional terms or conditions not contained in their proposal which are in the best interest of the County or to otherwise revise the scope of this RFP.

This RFP does not constitute a contract or an offer of employment. The cost of preparation of proposals shall be the obligation of the Proposer. All proposals, whether accepted or rejected, shall become the property of the County and will not be returned. Unnecessarily elaborate responses, enclosures and specialized binding are not desired, and may be construed as an indication of Proposer’s lack of cost consciousness.

- VIII. County’s Rights:** The County reserves the right to:
1. Request clarification of any submitted information
 2. Waive any informalities or irregularities in any qualification statement
 3. Not enter into any Agreement
 4. Not select any Consultant Team
 5. Cancel this process at any time
 6. Amend this process at any time
 7. To award more than one contract if it is in the best interest of the County
 8. Interview Consultant Teams prior to award
 9. To request additional information during an interview

- IX. El Dorado County Web Site Requirements:** It is the bidder's responsibility to monitor the County's website for possible addenda to this bid to inform him/her of the most current specifications, terms, and conditions, and to submit his/her bid in accordance with the original bid requirements and all addenda. All available bids and related addenda can be found at:

<http://edcapps.edcgov.us/contracts/invite.asp>

Failure of bidder to obtain this information shall not relieve him/her of the requirements contained therein. Those bidders not acknowledging and returning Addenda as required will not be considered and will be rejected as "non-responsive."

- X. Evaluation:** Proposals shall be evaluated by a team composed of County personnel representing the El Dorado County Risk Management Department on the basis of:

- A. Thoroughness, clarity, and quality of proposal– 15 points.**
- B. Experience and Qualifications of Firm – 20 points.**
- C. Experience in El Dorado County – 10 points**
- D. Experience with TIM Fee Program Development – 20 points**
- E. Experience with CIP Program Development – 20 points**
- F. Experience with Public Relations/Outreach – 10 points**
- G. Experience with Public Agency Financing Plans – 20 points**
- H. Proposed Fees – 15 points**

Total Points Possible – 130 points

Failure to comply with any of the requirements contained herein may result in disqualification. It is the responsibility of all Proposers to read ALL sections of this RFP prior to submitting a response.

- XI. Award:** Award shall be recommended to the Proposer whose proposal best meets the needs of the County. The County reserves the right to reject any or all proposals, and to solicit additional proposals if deemed in the best interest of the County to do so. The decision of the County Board of Supervisors shall be final in making such determination.

The successful Proposer will receive written notification of the award, along with instructions for finalizing the Agreement documents. Receipt of the fully-executed Agreement will serve as Proposer's notice to proceed with services.

Failure to comply with any of the requirements contained herein may result in disqualification. It is the responsibility of all Proposers to read ALL sections of this RFP prior to submitting a response.

XII. Business License Requirement: It is unlawful for any person to furnish supplies or services, or transact any kind of business in the unincorporated territory of El Dorado County without possessing a County business license unless exempt under County Code Section 5.08.070. Contact the Tax Collector's Office at 360 Fair Lane, Placerville, CA 95667, or phone (530) 621-5800, for further information. El Dorado County is an equal opportunity employer (EOE). Minorities, females, and handicapped are encouraged to participate (M/F/H).

It is not a requirement to possess a County business license at the time of proposal submittal. Successful Proposers may be required to possess a County business license to award contract.

The County of El Dorado is an equal opportunity employer (EOE). Minorities, Females and Handicapped are encouraged to participate.

XIII. Public Agency: It is intended that other public agencies (i.e., city, special district, public authority, public agency and other political subdivisions of the State of California) shall have the option to participate in any Agreement created as a result of this Request for Proposal to Bid with the same terms and conditions specified there in, including pricing. The County shall incur no financial responsibility in connection with any Agreement from another public agency. The public agency shall accept sole responsibility for contracting for services and making payment to the vendor.

Your participation in the RFP process is important to El Dorado County!