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DATE: **October XX, 2007**

TO: **PROSPECTIVE CONSULTANTS**

SUBJECT: **REQUEST FOR PROPOSAL (RFP)**
UPDATE TO THE CITY OF MILPITAS GENERAL PLAN
HOUSING ELEMENT AND CEQA CLEARANCES

Dear Consultant:

The City of Milpitas requests written proposals and statements of qualifications for planning services to prepare a comprehensive update and revision to the Housing Element of the Milpitas General Plan and any necessary CEQA clearances. Milpitas' previous General Plan Housing Element was revised in 2002 as was found in compliance with state housing element law in October 2002. Milpitas received a Local Government Leadership Award on its 2002 Housing Element from Department of Housing and Community Development (HCD).

BACKGROUND INFORMATION

The City of Milpitas contains approximately 14 square miles, extending between the south end of San Francisco Bay and the Los Buellis Hills of the Mount Diablo Range in northern Santa Clara County. The City of Fremont (Alameda County) lies to the north and the City of San Jose (Santa Clara County) adjourns Milpitas to the south. Milpitas' sphere of influence includes 4 square miles of unincorporated Santa Clara County. The City's population is approximately 66,568 as of January 1, 2007 (State Department of Finance).

The City of Milpitas has recently received its Association of Bay Area Governments (ABAG) Regional Fair Share Housing Allocation Projections. The jurisdiction's need has been identified as approximately **2,487** units over the next seven years (2007-2014):

Income Category	Percentage	# of Units
Very-Low	27.7%	689
Low	16.9%	421
Moderate	17.8%	441
Above-Moderate	37.6%	936
Total:	100%	2,487

The Milpitas Housing Element shall be updated pursuant to state housing element law, Article 10.6, Government Code Sections 65580-65589.9. As required by state housing law, the Milpitas Housing Element is due to the Department of Housing and Community Development (HCD) by June 30, 2009. Given the timing of this Request for Proposals, it is anticipated that the Milpitas Housing Element will be submitted to HCD, ideally no later than April 1, 2009.

Because the Housing Element is a project as defined within the California Environmental Quality Act, it will be necessary for the consultant team to prepare appropriate environmental documentation in accordance with the California Environmental Quality Act (CEQA). This will include preparation of an Initial Study to determine the appropriate level of environmental review. Depending upon the Initial Study, either a Negative Declaration or an EIR will be required.

Midtown Specific Plan and Transit Area Specific Plan

The City of Milpitas has two major specific plans that will significantly impact the preparation of the General Plan Housing Element: 1) Midtown Specific Plan and 2) Transit Area Specific Plan.

Midtown Specific Plan
The Midtown Specific Plan was adopted by the City of Milpitas in March 2002, the plan provides for a new vision for approximately 1,000 acres of land. The overall strategy in the Midtown Specific Plan Area is to create a mixed-use community that includes high-density, transit-oriented housing and a central community "gathering place" while maintaining needed industrial, services and commercial uses. Key elements of the plan includes:

Allowing for up to 4,860 new housing units
High density residential development (31 to 40 units/per gross acre)
Transit-Overlay Development (TOD) Zoning within 2000 ft. (41 to 60 units/per gross acre)
Mixed-use to allow mixture of retail, office, housing services, and public/quasi-public uses
Create lively pedestrian-friendly environment
20% Parking Reduction
Encourage assembly of parcels along S. Main Street to promote orderly development

Transit Area Specific Plan
The Transit Area Specific Plan was initiated in November 2004 to promote and encourage high-density residential and mixed-use development around the proposed new Milpitas BART Station located near Capitol Avenue and Montague Expressway. Currently, the Environmental Impact Report (EIR), General Plan and Zoning Change Amendments are being completed. It is anticipated that the Milpitas Planning Commission and City Council will consider the Transit Area Specific Plan within the next few months. Key elements of the plan includes:

Allowing for up to 7,100 new housing units
High density residential development (20 to 40 units/per gross acre)
Transit-Overlay Development (TOD) Zoning within 2000 ft. (41 to 60 units/per gross acre)
Mixed-use development (280,000 sq. ft. commercial retail, 750,000 sq. ft. professional office space)
Open Space for passive and active recreational use
20% Parking Reduction
Construction of a New BART Station

Housing Marketing Study
The City of Milpitas has recently prepared a comprehensive Housing Marketing that will assist and provide useful information during the preparation of the Housing Element. The purpose of the Housing Marketing Study was to provide a comprehensive assessment and analysis of the Milpitas housing market, including: 1) housing market conditions (existing and future trends), land use analysis to support housing conditions, 3) supply and demand of housing types, 4)

characteristics of the Milpitas housing market, and 5) the need and demand for executive level homes within the city.

Copies of both specific plans and the Housing Marketing Study will be provided upon request.

PROPOSAL SUBMISSION REQUIREMENTS

The following information must be provided in the proposal so that the City may review your firm's qualifications and approach to this type of project:

Section 1. Statement of Qualifications: Include the names and qualifications of all firms proposed to work on the project. Also list all key personnel to be used on the project, their capacity or role, including applicable descriptions and dates of similar work these persons have been directly involved with (please be clear about duties performed). Specifically, include any previous work updating General Plan Housing Elements for other municipalities and CEQA clearance work for other Housing Elements. Resumes for all members of the proposed project team must be provided in an appendix to your proposal.

Section 2. Project Understanding and Approach: Describe your understanding of the project. Describe any unique or effective methods, tools, and processes that your firm plans to use to meet the City's goals and objectives of the RFP and CEQA document.

Section 3. Scope of Services: A scope of services shall be provided with a breakdown of tasks and timing to complete the project and a detailed description of the methods for information gathering and analysis used in preparing the Housing Element and CEQA documents to meet the City's objectives and State Law. Proposals should outline a process for gathering all necessary information, preparing the Housing Element and CEQA documents, taking the documents through the public review and adoption process and getting approval of the Housing Element from HCD, including revisions and representing the City in meetings with HCD staff. Describe which members of the project team will be responsible for various task(s) and attending Include a detailed description of any requested materials needed from the City. Attachment A to this RFP is a City generated Scope of Services. Please review this scope and incorporate the City identified tasks into your proposed Scope of Services. If, in your professional judgment, the City provided scope of services should be expanded or edited, please feel free to do so in your proposal. Be sure to explain why you are recommending adding or deleting certain work requirements.

Section 4. References: Please list reference projects by title and location. Include a short description, state which key personnel proposed for the Milpitas project worked on the reference project and provide a contact name and number.

Section 5. Fee Estimate: Provide a not to exceed fee estimate for preparation of the housing element and CEQA clearances. The cost estimates provided by the consultant shall reflect detailed projected work hours per the scope of services, including hourly rates of compensation for staff, overhead charges for managing sub-consultants, travel, and production costs, etc. Cost

estimates shall include contingencies with upper limits. Include all assumptions made in arriving at the quoted figures.

Section 6. Schedule: Provide schedule and time frame to complete project. The schedule must reference all key steps identified in the scope of work.

SELECTION PROCESS

The City will review the proposals. The firms determined to be most capable of meeting the City's needs will be invited for an interview by the Consultant Review Board. It is the City's intention to convene a Consultant Review Board to interview the most qualified firms in November 2007. Approximately three consultant teams will be invited for an interview. The interview will consist of seven to ten questions relating to the project management, administration and consultant experience. Formal presentations of the firm's history or personnel experience of the proposed project members will be allowed, but limited in time.

A consultant's final placement will be based on the rating of the Review Board and completion of satisfactory reference checks. The City will select the most qualified consultant and negotiate scope of work and fee soon after. A sample copy of a standard City contract agreement is included as Attachment B. If you have any concerns over the standard contract agreement requirements, please address them in your proposal; otherwise, the City will assume all of the terms of our standard contract are agreeable.

SELECTION CRITERIA

The following criteria will be used in rating the proposals:

Experience of firm(s) and understanding of state laws governing the preparation of the Housing Element and CEQA documents;
Demonstrated experience with similar projects;
Experience of key personnel assigned to project;
References;
Responsiveness to RFP;
Quality of proposal submittal;
Current workload of firm;
Ability to complete the project in a timely manner;
Description of resources, including personnel, to conduct each phase of the project;
Written guarantees or assurances that the proposed team will be assigned to the project

TIMELINE

Five complete copies of each proposal must be provided. Each Section of the proposal shall be clearly labeled and tabbed for easy reference. The five copies shall be provided to the City in a a sealed envelope by Friday, **November 9, 2007 at 5:00 p.m.** The proposals may be mailed to the mailing address below, but must arrive by the November 9th deadline. Proposals may be sent overnight mail service or walked-in to the address identified for "walk-in" below.

Mailing Address
City of Milpitas
455 E. Calaveras Blvd.
Milpitas, CA 95035

Walk-In/Overnight Mail Address
City of Milpitas
455 E. Calaveras Blvd.
Milpitas, CA 95035

Attn: Felix J. Reliford, Principal Housing Planner

Any questions regarding this proposal, please contact Felix Reliford at (408) 586-3071 or freliford@ci.milpitas.ca.gov.

The following is an outline of the anticipated schedule for proposal review and contract award:

Issue RFP	*10/5/07*	
Proposal due date	*11/9/06*	*by 5:00 p.m.*
Proposal evaluation completed	*11/16/06*	
Conduct finalist interviews	*Week of November 26-30, 2007*	
Execute Contract	12/4/07	

REMINDER: In order to be considered, all proposal packets must be submitted by 5:00 p.m. on Friday, November 9, 2007. No late proposals will be accepted.

MISCELLANEOUS NOTES:

The City reserves the right to reject any proposal as non-responsive if the proposal fails to include any requested information. This RFP and interview process shall in no way be deemed to create a binding contract or agreement of any kind between the City of Milpitas and the candidates.

Each candidate submitting a proposal in response to this RFP acknowledges and agrees that the preparation of all materials for submittal to the City and all presentations, related costs and travel expenses are at the candidate's sole expense and the City shall not, under any circumstances, be responsible for any cost or expenses incurred by the candidate. In addition, each candidate acknowledges and agrees that all documentation and/or materials submitted with the RFP shall remain the property of the City.

Consultant shall identify any sections of this proposal that they disagree with in regards to content, scope of services provided references, selection process, etc. Selected consultant will be required to execute the standard Milpitas Consultant Services Agreement (see attached example).

ATTACHMENTS-Consultant Resources

(A) Scope of Services
(B) Standard Consultant Services Agreement

ATTACHMENT A

City of Milpitas
Proposed Scope of Services

Consultant shall provide the following services:

Initial meeting with Planning and Neighborhood Services Department staff to gain a comprehensive understanding of the Housing Element Update & CEQA clearance project.

Prepare the Housing Element update pursuant to State of California Housing Element Law, Article 10.6 and Sections 65580-65589.9 and State CEQA Requirements. The update shall include the following:

Population and Household Profile: **This section shall use the latest information and data from DOF, County of Santa Clara Consolidated Plan, the 2000 census data, and other available sources.**

Housing Needs: **This Section shall incorporate the Cities share of the Regional Housing Needs as developed and adopted by ABAG to reflect the 5-year planning period of the Housing Element.**

Housing Characteristics: **This section must use the most recent housing data and information from DOF 2000, Census, and ABAG. Information should also be gathered from the City's Housing Rehabilitation Program, the Local Board of Realtors and any other relevant sources.**

Adequate Site Inventory: This section must evaluate the City's existing inventory of available land and infrastructure, which could accommodate future housing developments. Discuss the use of mixed-use development to increase the housing supply. Create an adequate sites map and database.

Review of Existing Housing Element: **This section shall evaluate the progress made in implementing the goals, objectives and programs from the 2002 Housing Element. This review should include the following:**

Progress in the implementation;
Effectiveness of the element;
Effectiveness in meeting goals, objectives, and polices.

Housing Goals, Policies and Programs: **This section shall describe the City's anticipated housing goals for the next five-year period and shall discuss specific housing programs and list quantifiable objectives by income group.**

Housing Constraints: **In addition to identifying governmental and market constraints to housing, this section of the Housing Element shall include a description of local efforts to remove barriers to housing.**

Analysis of the City's Homeless Population: **This section shall address the City's strategies and efforts to identify and assist the homeless population with programs and housing opportunities.**

Preservation of Assisted Housing Units At-Risk: **Analysis of existing assisted rental housing developments that are eligible to change to market rate units including estimated total cost of producing new replacements of housing units, and cost of preserving the assisted housing developments. Name, location of projects, earliest possible date of conversion to market rate and total number of elderly and non-elderly units to be lost from low-income housing stock. Discuss the government code requirements related to financial resources available for housing and conversions of at-risk residential units.**

Housing Implementation Plan: **Provide a comprehensive 5-year plan of action to implement policies that achieve the goals and objectives outlined within the Housing Element. Topics to be included are: administration of land use and development controls, provision of regulatory concessions and incentives, utilization of appropriate federal, and state financing, subsidy of low and moderate-income housing, identification of adequate housing sites, analysis of ABAG projections of housing needs, and discussion of local housing programs and activities.**

Additional Topics: Address any additional topics, which may not be included in this proposal to comply with state laws governing preparation of Housing Elements and that aid the City in meeting its housing goals.

A listing of affordable housing partners working within the community, such as the Santa Clara County Housing Authority and other local non-profits housing providers. All of these groups should be contacted as part of the process of preparing the housing element.

Preparation of charts, graphics, tables, maps, statistical and geo-data, etc. to meet the Housing Element Requirements.

Attendance at public meetings. The budget should assume attendance at a minimum of four public meetings: One Planning Commission meeting, one Council meeting, and two public participation meetings. The budget should reference the cost for additional meetings beyond four on a per-meeting basis.

Recommendations of appropriate General Plan and other text amendments to update the General Plan Housing Element.

Preparation of necessary environmental review documents (negative declaration, supplemental environmental impact report, etc.) to meet California Environmental Quality Act requirements.

Outline a public participation process to obtain public input and comments on preparing the Milpitas General Plan Housing Element.

Information of where consultants can find the following documents on-line (www.ci.milpitas.ca.gov)

- **General Plan**
- **Housing Element Update (latest)**
- **Zoning Ordinance**
- **Midtown Specific Plan**
- **Draft Transit Area Plan**

Any other documents will be provided by the City of Milpitas upon request.