



## Legislation Text

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**File #:** 2024-0614, **Version:** 1

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**To:** Sonoma County Board of Supervisors

**Department or Agency Name(s):** Permit Sonoma

**Staff Name and Phone Number:** Tennis Wick (707) 565-2563, Scott Orr (707) 565-1754, Haleigh Frye (707) 565-2477, Ross Markey (707) 565-2543

**Vote Requirement:** Majority

**Supervisorial District(s):** Countywide

**Title:**

General Plan Update Project Phase 1 Contract Award

**Recommended Action:**

Authorize the Director of Permit Sonoma to negotiate, finalize, and execute an agreement with PlaceWorks, in a form approved by County Counsel, for the preparation of the first phase of an update to the Sonoma County General Plan 2020, in the amount of \$723,711 plus a 5% contingency of \$36,185, for a total not to exceed amount of \$758,896 and for a term of 2 years ending 5/24/2026.

**Executive Summary:**

On December 12, 2023, the Board of Supervisors held a public workshop to kick off the General Plan update. As part of that item, the Board received information and provided comments to Permit Sonoma on its proposal to recruit a consultant to assist staff with the first phase of the project.

The scope for the "Phase 1" work includes a detailed audit of the current Sonoma County General Plan 2020, marketing the planning effort, conducting community outreach, establishing an engagement platform that will carry through the entire planning process, and establishing a timeline and budget for the General Plan update and associated Environmental Impact Report. Permit Sonoma staff will conduct outreach with local Tribes separately from the scope of work to be completed by the consultant utilizing our existing government-to-government processes.

**Discussion:**

The General Plan is a shared community vision that reflects community priorities and values while shaping our future growth, encourages housing and job development, fosters healthy and resilient communities, guides the protection and management of natural resources, and promotes social and economic equity. State General Plan Guidelines recommend that General Plans be updated every five to ten years to ensure that they remain relevant and reflect local physical and demographic changes and broader changes in culture and technology. The Sonoma County General Plan 2020, that has served our community since 2008, needs a comprehensive update to address State law requirements and to reflect shifts in community values that have been shaped by recent events such as wildfires, floods, and other disasters.

**Request for Proposals:**

Permit Sonoma released a Request for Proposals (RFP) on March 14, 2024, to solicit proposals for the first phase of the General Plan update. Five firms: 4Leaf, Inc., Dyett & Bhatia, Minitier Harnish, LP., PlaceWorks, and Rincon Consultants, Inc., responded with proposals for the requested scope of work.

County staff evaluated and scored proposals according to criteria outlined in the RFP which included the following criteria:

- a. Demonstrated ability to perform the services described (20%);
- b. Experience, qualifications and expertise, and demonstrated history of providing similar services to comparable entities (20%);
- c. Quality of work as verified by references (15%);
- d. Clear and concise proposal to meet project objectives (15%);
- e. Level of detail in outreach proposal (15%);
- f. Costs relative to the scope of services (5%);
- g. Willingness to accept the County's contract terms (5%);
- h. Locality of the Proposer (5%).

The review panel consisted of three staff members from the Planning Division of Permit Sonoma, one staff member from the Outreach and Engagement Division of Permit Sonoma, and one staff member from the City of Santa Rosa Planning & Economic Development Department. In-person interviews were held with the top three firms: 4Leaf, Inc., Dyett & Bhatia, and PlaceWorks. Staff unanimously scored PlaceWorks as the preferred bidder because its proposal strongly emphasized an equity-driven planning process and demonstrated understanding of Sonoma County. PlaceWorks highlighted their success working with jurisdictions around the state on general plan updates in jurisdictions such as Contra Costa, Placer, and Lake counties. The City of Santa Rosa selected PlaceWorks to assist with their General Plan 2050 project for which a draft plan was released in 2023 and is currently available for public review.

Through contract negotiations with PlaceWorks, minor amendments were made to the final scope of work to expand outreach opportunities. The cost of the tasks identified in the scope of work is \$723,711. The contract not-to-exceed amount is \$758,896 to provide contingency funds of approximately 5 percent of the estimated cost of the project. In addition, PlaceWorks has requested modifications to the indemnity provision of the agreement limiting indemnification to circumstances where the consultant acted negligently. Further, a provision has been added in accordance with new state law to clarify that the consultant will not be involved in preparing or assisting the County with the Phase 2 RFP and to reduce the potential for conflict under state law if PlaceWorks were to respond to that RFP.

### **Project Budget:**

In 2009, Permit Sonoma projected that a General Plan update would cost \$3.5 million when it established the General Plan Administration (GPA) account to cover half the cost of the update. The General Fund was expected to cover the remaining half. The GPA account is funded through a 15% Planning Administration Fee charged on top of building and planning permit fees. Since the creation of the GPA, the scope of General Plan requirements has expanded, new State law requirements have been implemented, and public outreach standards have increased which will require an expanded scope for the General Plan update.

On May 17, 2022, staff provided the Board with an updated cost estimate totaling \$7.8 million, which includes

in-house staffing and external services. The work is expected to be conducted over 6 years, specifically from FY 2023/24 through FY 2027/28 (Attachment 2). At that time staff identified a \$2.8 million funding gap after factoring in annual baseline departmental General Fund contribution and available General Plan Administration Fee fund balance. As a consequence, the Board allocated \$2.8 million in one-time discretionary funds towards this project during FY 2022/23 budget hearings. Staff has been working in Fiscal Year 2023/24 on updates of individual elements including an adopted Housing Element update, an update to the Public Safety Element, and a new Environmental Justice Element. Once the latter two elements are adopted in 2024, all three elements will be incorporated into the larger General Plan project.

**Strategic Plan:**

As the County embarks on its fourth comprehensive overhaul of its General Plan, the Board of Supervisor’s current Five-Year Strategic Plan has created a framework to address the most pressing challenges facing Sonoma County while promoting a healthy equitable, and sustainable community.

On January 28, 2020, the Board held a planning retreat to develop a strategic direction for the County. The process is centered around several topics (Healthy and Safe Communities, Racial Equity and Social Justice, Climate Action, Organizational Excellence, and Infrastructure). The strategic plan was adopted on March 02, 2021. The Board’s strategic plan provides valuable direction and framing to community conversations that would occur for General Plan 2040. By aligning the five-year Strategic Plan with the general plan update, Sonoma County can create a cohesive, forward-thinking blueprint that addresses current needs while laying the groundwork for sustainable, equitable, and resilient development.

This item directly supports the County’s Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

**Pillar:** Climate Action and Resiliency

**Goal:** Goal 5: Maximize opportunities for mitigation of climate change and adaptation through land conservation work and land use policies

**Objective:** Objective 1: By 2025, update the County General Plan and other county/special district planning documents to incorporate policy language and identify areas within the County that have the potential to maximize carbon sequestration and provide opportunities

**Racial Equity:**

**Was this item identified as an opportunity to apply the Racial Equity Toolkit?**

No

**Prior Board Actions:**

12/12/23: Board of Supervisors Workshop: Sonoma County General Plan Kick-Off

FY 2022/23 Budget Hearings: The Board allocated \$2.8 million in onetime discretionary funds to support the General Plan Update.

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY 23-24 Adopted</b>	<b>FY24-25 Projected</b>	<b>FY 25-26 Projected</b>
Budgeted Expenses		\$644,912.07	\$113,984.48
Additional Appropriation Requested			
<b>Total Expenditures</b>		<b>\$644,912.07</b>	<b>\$113,984.48</b>
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance		\$644,912.07	\$113,984.48
Contingencies			
<b>Total Sources</b>		<b>\$644,912.07</b>	<b>\$113,984.48</b>

**Narrative Explanation of Fiscal Impacts:**

Contract costs are included in the FY 2024/25 and FY 2025/26 department budget funded through a combination of the \$2.8 million discretionary funding allocated by the Board in FY 2022-23 for the General Plan update and the General Plan Administration fund.

**Narrative Explanation of Staffing Impacts (If Required):**

N/A

**Attachments:**

- Attachment 1: Professional Services Agreement
- Attachment 2: FY2022\_23\_BOS\_Budget\_BIR-02

**Related Items “On File” with the Clerk of the Board:**

N/A