

**University of California,
Santa Barbara**



Request
for
Qualifications for the:

**Long Range Development
Plan
Open Space Management
Plan Project**

RFQ Number:

FM170380

Office of
Campus Planning and
Design

July 2017



**University of California, Santa Barbara
LRDP Open Space Management Plan Project**

RFQ No. FM170380

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EXHIBITS:

Statement of Qualifications Form	See UCSB website for download at: http://web.facilities.ucsb.edu/contracts/proposals/
UCSB Professional Services Agreement	(See separate .pdf file)
Certificate of Insurance	(See separate .pdf file)



ADVERTISEMENT

PROJECT NAME: LRDP Open Space Management Plan Project

RFQ NUMBER: FM170380

PROJECT DESCRIPTION: Qualifications are hereby solicited from environmental consultants interested in providing biological survey services and assistance in habitat restoration planning for the preparation of a campus-wide Open Space Management Plan (OSMP).

The University of California, Santa Barbara (UCSB or University) is requesting qualifications and proposals to assist UCSB in the preparation of a Long Range Development Plan (LRDP) Open Space Management Plan. The University of California, Santa Barbara is preparing a comprehensive Open Space Management Plan (OSMP) in accordance with the 2010 LRDP.

The UCSB 2010 Long Range Development Plan Policy OS-09 requires UCSB to prepare a LRDP Open Space Management Plan to address permanent preservation, restoration, and ecological connectivity of all Open Space lands on campus. Open Space lands are shown in LRDP Figure F.1, Open Space Areas. There are approximately 340 acres of Open Space land at UCSB. Approximately 150 acres of the Open Space lands are not covered under a management plan or are not a restoration or mitigation site and these lands are the main focus of this proposed study and plan. Within these 150 acres there are small mitigation or restoration sites that are not under a management plan. The lands not currently under a management plan would be surveyed and integrated (conceptually) into the larger open space land planning.

LRDP Policy OS-09 includes a requirement to include the restoration plans for North Campus Open Space Restoration (NCOS) area (former Ocean Meadows site) into the OSMP. The NCOS Restoration area is fully planned, permitted, and under construction. The University has all the required information in regards to this site. The information would be provided to the consultant solely for the purpose of adding it to the plan. No biological surveys, plan preparation, or reporting would be required for the NCOS area.

While the primary focus of this study is the surveying of and planning for the approximately 150 acres of Open Space land that are not currently in a management or part of a restoration plan, there is also a component of the project which requires integrating the planning of the edges of these lands with the lands currently under an existing management plan. In addition, some ground-truthing will need to be performed to confirm or update current habitats within managed lands. The “ground-truthing” does not include a detailed biological survey.

The University has several existing informal management and restoration plans that cover the majority of the target 150 acres, so the primary focus of the work effort will be ground surveys, mapping of resources and working with University staff on integrating current survey information into existing plans and then integrating these plans into a cohesive overall management and restoration framework. Several tasks will be described below and the University may choose to use the consultant to perform one or all of the tasks.

The OSMP would become an appendix in the University's LRDP and will include a vision and written plan for restoring and connecting all 340 acres of open space lands at the University. The OSMP will require certification by the Coastal Commission as an LRDP Amendment and once certified, the University is required to report annually to the Coastal Commission on its implementation status.

Restoration Goals and Opportunities

The OSMP will identify restoration goals and opportunities for restoration and enhancement of the open space habitats. The consultant would assist University staff in developing restoration goals and opportunities for restoration and enhancement of the open space habitats including but not limited to:

- Location of habitat types targeted
- Level and types of restoration/enhancement
 - Eradication of invasive species
 - Planting or re-establishment of native species
 - Sediment removal
- Measures for long term conservation of:
 - Raptor habitat
 - White tailed kite
 - Snowy Plover
 - Sensitive wildlife species
- Criteria of successes for the restoration goals and objectives
- Prioritize restoration projects
 - Timeline for implementation
- Fuel modification/fire reduction-vegetation management

Open Space Management Plan

The OSMP will include a baseline assessment to inform restoration goals and opportunities for open space lands. The OSMP will include long-term tree management strategies to protect raptor habitat and/or monarch butterfly aggregations. Tree management strategies include but are not limited to phased restoration ensuring there is no interim loss of available habitat serving the same habitat function, when the existing tree masses reach senescence or for any reason, including habitat management objectives, must be removed. The OSMP will include native tree replacement species and could be planted to gradually replace non-native habitats.

The OSMP will include lists and integration of approved management plans, restoration plans, and mitigation measures and will evaluate restoration of an unapproved development such as trails through sensitive areas. A list of the management, restoration, and mitigation plans will be provided to the consultant as well as the documents themselves as needed.

The OSMP will detail future Monitoring and Adaptive Management Provisions for the restoration projects and to use for reporting with the California Coastal Commission.

GENERAL INSTRUCTIONS

Consultant(s) with qualifications that include experience in providing similar services are encouraged to respond. A copy of the Request for Qualifications and associated documents will be available on the University's website at:

<http://web.facilities.ucsb.edu/contracts/proposals/> (*click the appropriate project button>>download the project documents*) or call Greg Moore at (805) 893-3298 for assistance.

*Three (3) hardcopy sets and one (1) digital copy (.pdf) of each consultant team's Proposal must be delivered to UCSB by 2:00 p.m. on **August 14, 2017** to the following address:*

*Attn: Greg Moore, Assoc. Director
Design & Construction Services
Facilities Management Bldg. 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, CA 93106-1030*

Affirmative Action Statement

Each candidate firm will be required to show evidence of its equal employment opportunity policy. Every effort will be made to ensure that all persons, regardless of race, religion, sex, color, ethnicity and national origin have equal access to contracts and other business opportunities with the University.

SCOPE OF SERVICES

The University is seeking a consultant to assist in the preparation of a campus-wide Open Space Management Plan. This consultant would conduct biological resources surveys of open space land not under management and use that biological resource data to assist the University in identifying restoration opportunities that would connect the University's open space lands.

The University has an abundant amount of information and knowledge of campus Open Space lands and wishes the consultant to support the University in preparation of the plan by providing field work, biological survey data, technical studies when applicable, visioning, writing and producing reports, GIS mapping, preparation of figures and detailed site plans and potentially preparation of the final plan to be incorporated into the LRDP as an Appendix.

The final product will be a reproducible Final Open Space Management Plan including all required elements of LRDP Policy OS-09. The Final OSMP will include color 11 by 17 maps and figures as applicable. Full size maps/plans are required however, would be printed in 11 by 17 for the LRDP.

Task 1 - Meetings and Information Gathering

The consultant would meet with University staff for a kick-off meeting and discussion of existing information and consultant expectations. The University will provide the consultant with all existing data electronically and in hard copy when available. Consultant is expected to utilize to the greatest extent feasible existing management and restoration plans as appropriate. A list of all available documents, including 6 management plans and at least 19 restoration plans, is attached to this RFQ.

During the process, the consultant would meet with, have telephone conversations, and email correspondence regularly with staff from the Office of Campus Planning and Design and the Cheadle Center for Biodiversity and Ecological Restoration (CCBER).

Task 2 - Baseline Assessment

The consultant would conduct general biological resources surveys and do vegetation mapping using GPS/GIS mapping of the approximately 150 acres of open space land not under a management plan, or part of a mitigation or a restoration site. Site reconnaissance to all other open space areas would be conducted to verify and report on habitats in accordance with existing habitat management plans. Personal communication with CCBER staff is required for reconnaissance and reporting of managed open space lands to obtain existing information and data.

Reconnaissance and reporting of the NCOS Restoration project area is excluded from this scope. The NCOS site is currently under construction. The baseline assessment will include plans for NCOS Restoration however NCOS plans are complete and the consultant is not required to create or modify them.

The baseline assessment will include the types of habitat, habitat linkages, wildlife corridors, evaluation of the existing level of disturbance or degradation of resources, and success of previous or ongoing restoration projects. The consultant will work closely with CCBER and staff from Campus Planning and Design for evaluation of existing restoration projects and this specific task will be highly collaborative and may not require a significant amount of consultant effort. This would be determined as plan preparation proceeds along.

The baseline assessment will include a description of existing vegetation management practices for fire reduction or habitat restoration purposes.

The consultant would prepare draft biological resources survey reports including results, evaluations of sites, and maps for University staff comment. The consultant would integrate comments into the biological survey report. A final report would be prepared and submitted to the University. The biological resources report would be incorporated into the OSMP.

Task 3 - Detailed Site Plans/Maps

The consultant would prepare the following site plans, maps, and figures for the OSMP. Maps and figures will include the NCOS Restoration Project. The University will provide all NCOS mapping data to the consultant as well as all existing GIS mapping data. Maps and figures would be full size plans and capable of printing 11 by 17 size to incorporate into the LRDP.

- Existing Conditions/Habitat Map-including NCOS
- Full Size Map of Open space areas titled Campus Habitat Restoration Map
 - All restoration and enhancement projects including both voluntary and required as mitigation
 - Roads, trails, bicycle paths, utilities, and buildings in relation to all habitat restoration or enhancement projects.
- Restoration Plan
Comprehensive restoration program including public access

Task 4 - Draft and Final Open Space Management Plan

The consultant will prepare a Draft OSMP for review and comment. University comments would be integrated into the Draft OSMP and a Final, reproducible OSMP would be prepared and submitted to the University in electronic format.

The OSMP must include the following components in be in accordance with LRDP Policy OS-09:

- Baseline Assessment
- Restoration Goals and Opportunities
- Raptor Habitat/Monarch Tree Masses-Long Term Management
- Lists and integration of approved management plans/mitigation measures
- Restoration of unapproved development
- Monitoring and Adaptive Management Provisions

Deliverables

- Draft and Final Biological Resources Survey Report-including maps and figures
- Draft Restoration Goals and Opportunities Report-including maps and figures
- Draft and Final OSMP-including maps and figures

Task 5 - Coastal Commission Support-LRDP Amendment

As required, the Final OSMP will be submitted to the Coastal Commission as an LRDP Amendment. The LRDP Amendment process will involve response to comments from the Coastal Commission. The consultant will provide support in response to Coastal Commission requests as applicable. This includes, but is not limited to additional field work, calculating impact and restoration areas, and creating special exhibits and mapping.

Project Schedule

- A final OSMP is due to be submitted to the Coastal Commission as an LRDP Amendment in December 2017.
- Biological Resources surveys and the report are due 6 weeks from contract initiation.
- Draft Restoration Goals and Opportunities due 8 weeks from biological resources survey report
- Draft OSMP due 4 weeks from Restoration Goals and Opportunities
- Final OSMP due two weeks after comments are received from the University

SERVICES PROVIDED BY UCSB

1. Restoration Planning and Biological Resources Expertise from University staff and faculty
2. Existing Management Plans (links to plans provided)
3. Existing Habitat Restoration Management Plans (list and links to plans provided and also available upon request)
4. Lists of Restoration Projects (list attached)
5. Lists of Mitigation Measures including CEQA and Coastal Commission Conditions of approval.
6. All relevant Coastal Commission permits (available upon request)
7. North Campus Open Space Restoration Project plans, documents, and data
8. Relevant GIS and AutoCAD data
9. 2010 Long Range Development Plan
www.facilities.ucsb.edu/departments/campus-planning-design/2010-long-range-development-plan-lrdp
10. CCBER Website <https://www.cber.ucsb.edu/>

Project Site Map

Document Path: G:\Planning\Plus\06-062 2010 LRDP\10.Misc\GIS\PLANS\OpenSpace\FigF1_Proposed_Open_Space_11x17 (2).mxd Date: 2/1/2017



0 700 1,400 Feet



PROJECT SCHEDULE*

Advertisement	July 26, 2017
RFQ Deadline: Due at UCSB by 2:00 pm	August 14, 2017
Notify Shortlisted Firms **	August 21, 2017
Finalists' Interviews	Week of August 21, 2017
Successful Firm Notified	Week of August 28, 2017
Contract Award	On or about September 4, 2017
Project Kickoff	September 4, 2017
Biological Resources Survey Report	September 29, 2017
Draft OSMP	November 6, 2017
Final OSMP	December 8, 2017

**The project schedule is tentative and subject to change. The exact dates will be set forth by the University as part of a notification letter to the selected Consultant.*

***The resultant selected short-listed firms will be posted on the UCSB Design & Construction Services website.*



INSTRUCTIONS TO APPLICANTS

Environmental consultants with qualifications that include experience in the preparation of Open Space Management Plans and/or Habitat Restoration and Management Plans, biological resource surveys, and preparation of supporting maps, plans, and figures, are encouraged to respond. A copy of the Statement of Qualifications (SOQ) form will be available on our home page: <http://facilities.ucsb.edu> click on Requests for Proposals or call Greg Moore at (805) 893-3298.

1. Respond concisely to the Selection Criteria and complete the Statement of Qualifications Form. A list of projects of similar scope, complexity, and cost will be essential to a successful application. The Statement of Qualifications must be signed by a responsible member of the firm applying for the project.
2. Provide a list of projects of similar scope and complexity along with team member's roles, project construction budgets, bid amounts, and final change order amounts related to errors and omissions. Please also address the scheduled duration of construction and total of delays attributable to errors and omissions. Project statistics should include net and gross areas, efficiency ratio, and a contact person with a telephone number.
3. Your Proposal shall also address the following:
Cost Control and Scheduling – What mechanism or procedures will the team implement to control costs?

Professional Services Agreement – Note any exceptions to the enclosed Professional Services Agreement that would prevent your firm from executing the Agreement. The University cannot accept any request to include language to limit liability with regards to insurance and/or modify the indemnification clauses. Proposal submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Agreement (see enclosed Agreement). Provide a copy of your current billing rate schedule and proposed consultants.

This area intentionally left blank.

Certificate of Insurance – Note any exception to the Certificate requirements and provisions that would prevent your firm from executing an Agreement. Proposal submittal shall include a separate letter affirming the intent of the proposer’s acceptance of terms and conditions contained in the Certificate of Insurance (see enclosed certificate). Minimum Insurance limits are as follows:

General Liability: Comprehensive or Commercial Form	Min. Limit
Each Occurrence	\$1,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal and Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Business Automobile Liability	Min. Limit
Each Occurrence	\$1,000,000
Workers’ Compensation	as required under California State Law
Professional Liability	Min. Limit
Each Occurrence	\$1,000,000
Project Aggregate	\$1,000,000

Individual Experience – Submit resumes of the responsible Partner, the Project Manager, the Principal Inspector and technical consultants focusing on relevant experience of those individuals (not the collective corporate experience of the firm).

Work Location – Identify any portions of the scope of work that will be performed outside of the office responding to the RFP and the individuals responsible for that work.

4. Include supplementary information demonstrating your firm’s relevant professional qualifications (8 ½ x 11 format). Work submitted as an example of the consultant’s qualifications will be considered only to the extent it is similar to the proposed project. Provide information on proposed staff and consultants for this project and an organization chart.

5. Return to: Greg Moore, Associate Director
Design & Construction Services
Facilities Mgmt., Building 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, CA 93106-1030
6. Submit three (3) copies of all SOQ/Proposal materials, bound into a single document, *and one (1) digital copy (.pdf) of each consultant team's proposal.*
7. SOQ/Proposal Due Date: August 14, 2017 no later than 2:00 p.m.

Consultants with qualifications considered appropriate by the Screening Committee may, at the sole discretion of the University, be asked to interview with the UCSB Screening/Selection Committee. See schedule above for tentative interview dates.



SELECTION CRITERIA

1. ***Professional ability;*** Ability as it can be evaluated by examination of the functional and technical qualities of work successfully completed on comparable for the University or other clients.
2. ***Program responsiveness;*** Previous experience that demonstrates success in completing projects consistent with similar technical requirements, which indicates the ability to complete the proposed project in a manner that is responsive to the specifics of the scope of services.
3. ***Evaluation of consultants proposed to be employed;*** Previous experience with special requirements appropriate to the project under consideration with demonstrable evidence that the consulting services can be obtained from the proposed staff, as required.
4. ***Production capability;*** Evidence of ability to perform all phases of the work, to produce work product that is of superior quality.
5. ***Coordination and supervision;*** Evidence of ability to provide experienced staff and timely support.
6. ***Proximity;*** To the Project location, willingness to establish a local office or an association with a local consulting firm.
7. ***Client relationships;*** Recognition of the consultative processes associated with work on a University Campus, public sector owner, or other comparable clients.
8. ***Equal Opportunity;*** The commitment of the University to equal opportunity applies to the selection of design professionals.



PRIVACY NOTIFICATION

The state of California Information Practices Act of 1977 requires the University to provide the following information to individuals who are asked to supply information about themselves:

The principal purpose for requesting the information on this form is for use in the selection process for Design Professionals commissioned by the University. University Policy authorizes maintenance of this information.

Furnishing all information requested on this form is mandatory - failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form will be used by the Office of Design & Construction, Facilities Management, University of California at Santa Barbara in consideration of commissions to Design Professionals.

Individuals have the right to access to this record as it pertains to them.

The official responsible for maintaining the information contained on this form:

Associate Director, Contracting Services
Office of Design & Construction Services and
Physical Facilities, Building 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, California 93106-1030