Request for Qualifications/Request for Proposals
Development of MTD Calle Real Property

Santa Barbara Metropolitan Transportation District
550 Olive Street
Santa Barbara, CA 93101
Issue Date: June 11, 2018
Deadline for RFQ Submission: August 7, 2018
Request for Qualifications/Request for Proposals (RFQ/RFP)

Development of MTD Calle Real Property

PROJECT SUMMARY SHEET

Project Name: RFQ/RFP for Development of MTD Calle Real Property

Solicitation Issuance Date: Friday, June 11, 2018

Project Description: Serve as developer, jointly with the Santa Barbara Metropolitan Transit District (MTD), to develop and construct a residential project at MTD’s property located at 4678 Calle Real/149 North San Antonio Road in unincorporated Santa Barbara County. MTD’s goal is construction of a Transit Oriented Development (TOD) that will provide housing and public benefits consistent with existing Eastern Goleta Valley Community Plan land use and zoning designations. MTD’s intent is to minimize financial risk to MTD and maximize long term financial return in support of MTD operations.

Project Location(s): 4678 Calle Real/149 North San Antonio Road

APNs 059-140-004, 059-140-005, 059-140-006 and 067-230-026

Non-Mandatory Pre-Submittal Meeting Date/Time: Tuesday, June 26, 2018 at 3:00 P.M. (PDT)

Non-Mandatory Pre-Submittal Meeting Location: MTD, 550 Olive Street, Santa Barbara, CA 93101

Requests/Clarifications Deadline: Thursday, July 12, 2018 at 5:00 P.M. (PDT)

RFQ Submittal Due Date/Time: Tuesday, August 7, 2018 at 4:00 P.M. (PDT)

RFQ Submittal Due Location: MTD Administrative Offices, 550 Olive Street, Santa Barbara, CA 93101

Reception Desk on 2nd Floor

Shortlist Selection Date: September 11, 2018 (anticipated)

RFP Submittal from Shortlisted Firms Due: November 9, 2018 at 4:00 P.M. (PDT) (anticipated)

Solicitation Contact: Steve Maas, (805) 883-4227, smaas@sbmtd.gov

Type of Solicitation: Selection of shortlist based on evaluation of qualifications to perform the scope of work, followed by evaluation of development proposals and negotiation with the selected development entity.

Check MTD’s website at http://www.sbmtd.gov/about/doing-business for updates.
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
Request for Qualifications/Request for Proposals (RFQ/RFP)
Development of MTD Calle Real Property

INTRODUCTION
The Santa Barbara Metropolitan Transit District (MTD) is issuing this Request for Qualifications/Request for Proposals for Development of MTD Calle Real Property to develop and construct a multi-unit housing development targeting a mix of income levels that may include market rate housing (above 200% area median price levels), work force housing (81% to 200% of area median income levels), rental housing at and below 80% of area median income, and low, very low, and special needs housing (at and below 60% of area median income rent levels). The project will be a Transit Oriented Development (TOD) that will foster transit use, minimize automobile use and the need for parking, promote walkability, and encourage car-sharing and bicycling. The project will also incorporate public benefits including, for example, but not limited to: usable open space and recreation resources, preservation of identified environmental resources, and, potentially, transit-related use of a portion of the property. The project will be designed to be innovative, water efficient and maximize energy efficiency, toward the goal of zero net energy use.

MTD’s goal is to select a developer to engage in a private-public partnership with MTD structured in a manner that will minimize financial risk to MTD and maximize the financial return for MTD. MTD is seeking a long-term stream of income, potentially via a ground lease agreement, that will be used to fund MTD operations.

The intent of the Request for Qualifications (RFQ) is to identify a short list of qualified development entities that will be invited to subsequently respond to the Request for Proposals (RFP) for development of the property. MTD intends to accomplish this with a two-step process. In Phase 1, the RFQ phase, MTD is soliciting qualifications from capable development entities in order to evaluate candidate entities based on criteria identified below. MTD will evaluate submitted qualifications and as necessary conduct interviews and subsequently identify a short list of candidates. In Phase 2, the RFP phase, MTD will invite short-list candidates to submit detailed proposals for development of the property. MTD will then evaluate development proposals and establish an exclusive right to negotiate terms of an agreement with the selected development entity.

Qualifications are due August 7, 2018, by 4:00 P.M. (PDT). Submission requirements are detailed later in this RFQ.
BACKGROUND

MTD: MTD is a public transit agency formed in 1966 that provides bus service in the southern portion of Santa Barbara County, California. MTD's mission is to enhance the mobility of South Coast residents, commuters, and visitors by offering safe, appealing, equitable, environmentally responsible, and fiscally sound transit service. Further information regarding MTD can be found via its website at http://www.sbmtd.gov.

Site Location: On the north side of Calle Real between San Antonio Road and Dexter Drive, adjacent to the Santa Barbara County Government Complex and near the Turnpike Road interchange with Highway 101. The land is roughly rectangular in shape, containing approximately 1,320 feet of Calle Real frontage and a depth of about 600 feet.

Parcels: The property consists of four parcels totaling approximately 18.93 acres: (1) APN 59-140-004 - 8.85 acres; (2) APN 59-140-005 - 4 acres; (3) APN 59-140-006 - 4.66 acres; and (4) APN 67-230-026 - 1.42 acres. A summary document describing the property is included as Attachment 1.

Purchase History: MTD purchased the property in 1985 for the purpose of a potential bus terminal or transit site. Another site was acquired for that purpose instead and MTD started to focus its efforts on developing the property for transit oriented residential development purposes.

Zoning History: When MTD purchased the property in 1985 all four parcels were zoned residential. As a part of the 1993 Community Plan process three of the parcels were rezoned to Agriculture - A-1-5. Although some row crop farming did occur on the property years ago, the property is currently vacant and has not been farmed for at least a decade. An effort to rezone the property back to residential use began in 2008 with the Eastern Goleta Valley Community Plan process. Ultimately, the property was designated as one of the two primary housing opportunity sites in the Eastern Goleta Valley Community Plan in 2015 and rezoned Design Residential. Specifically, 10.2 acres are zoned DR-20, 6.8 acres are zoned DR-0.2 and the slightly less than 2-acre westernmost parcel remained zoned DR-20, for a total development potential of approximately 230 units, not including bonus density. The split zoning designation does not align with parcel boundaries. All of APNs 59-140-004 and 67-230-026 are zoned DR-20 while only approximately .6 acres of APN 059-140-005 and 1.26 acres of 059-140-006 contain that designation. The remaining 3.4 acres of 059-140-005 and 3.4 acres of 059-140-006 are zoned DR- 0.2 (see Attachment 1).

The Eastern Goleta Valley Community Plan contains Policy LUR-EGV-2.5, which is specific to the subject site, and which states the following, recognizing the potential for a future land use and zoning boundary adjustment:

    The MTD properties (APNs 059-140-004, -005, -006), located at 4678 Calle Real/149 North San Antonio Road shall receive land use designations appropriate for Residential Neighborhood Development. Consistent with this policy, the MTD properties shall be designated RES-0.33 (west portion, 6.8 acres) and RES-20.0 (east portion, 10.2 acres).

    The locations of the boundaries of the designations identified above and associated zones may be modified as part of a General Plan Amendment and Rezone provided the total
acreage associated with each designation does not change and the modification furthers the objectives of this policy. A Development Plan for these properties, respectively, shall:

- Plan, design, and propose one project for comprehensive consideration, rather than considering piece-meal proposals for the property.
- Provide Residential Neighborhood development complementary to surrounding uses Cluster development and constrain development envelope(s) appropriately to generate usable public open space, develop recreation resources, and preserve environmental resources.
- Provide multimodal transportation and circulation improvements to generate connectivity with commercial, recreational, and educational/institutional destinations.
- Provide pedestrian and bicycle improvements sufficient to connect residential uses to adjacent commercial, recreational, and educational/institutional destinations.
- Buffer residential uses from impacts associated with Hwy 101 and Southern Pacific Railroad travel corridors.
- Provide landscaping and/or streetscape to enhance community character and multimodal transportation facilities.

Essentially, this is a performance-based project that will be evaluated by County decision makers based in part on consistency with Policy LUR-EGV-2.5, and there will be an expectation from the community and neighbors for the same.

**Development History:** As stated above, while some row crop farming did occur on the property years ago, the property is currently vacant and has not been farmed for at least a decade. In approximately 2003, MTD conducted a design charrette for development of all four parcels. As a result, a Santa Barbara County Housing Authority development team began negotiating with MTD to build a transit-oriented development. While originally MTD proposed to sell the property, the discussion evolved into a potential long-term ground lease and then market conditions and other timing factors prevented the deal from ever coming to implementation in that time period.

**Water:** The properties benefit from the provisions of what is known as the Wright Judgment (Judgment). Pursuant to the terms of the Judgment, the Calle Real Property is eligible for Augmented Water Service from the Goleta Water District which, while Goleta Water District’s current drought-related moratorium on issuing new allocations remains in effect, enables the properties to obtain water service from available adjudicated water. MTD anticipates that once a joint developer is selected a water service application based on project plans will be submitted to Goleta Water District.

**Pre-Development Studies:** MTD has completed the following pre-development studies, which are available by download from MTD’s website (http://www.sbmtd.gov/about/doing-business):

- Preliminary title report
- Site survey
- Phase I Archaeological Resource Evaluation
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- Preliminary Biological Resources Assessment
- Wetland Delineation Report
- Preliminary Hydrology Report
- Preliminary Review of Geologic Hazards
- Traffic and Circulation Assessment

A summary of the findings of these studies is included as Attachment 2.

RFQ AND RFP PROCESSES

As discussed above in the Introduction, MTD’s intent is to solicit qualifications from capable development entities in an initial RFQ phase (Phase 1), evaluate candidate entities based on criteria identified below, conduct interviews as necessary, and subsequently identify a short list of candidates that, in a subsequent RFP phase (Phase 2), will be invited to submit proposals for development of the property in a functional partnership with MTD. Upon evaluation of development proposals, MTD will then negotiate terms of an agreement and participate with the selected development entity to develop the property consistent with MTD’s goal to construct a Transit Oriented Development (TOD) that will provide a range of housing types and affordability levels and public benefits at the subject property with minimal risk to MTD.

PROTEST PROCEDURES

MTD has established procurement protest procedures to ensure uniform, timely, and fair consideration of complaints received by MTD concerning its procurement activities. Such procedures are available on MTD’s website at http://www.sbmtd.gov/about/doing-business.
PHASE 1: RFQ

RFQ CONSIDERATION REQUIREMENTS

At the initial RFQ phase, responding development entities should prepare a response addressing the following:

Cover Letter. Letter shall be signed by an officer or principal committing the development entity’s best efforts to pursue the proposal and development and shall address the items identified below.

General Background. Include the:

- Legal status of your firm (partnership, LLC, corporation, etc.).
- Date your firm went into business and the initiation date of the development entity.
- The firm’s and the development entity’s growth patterns over the years since inception.
- Types of services provided and range of housing affordability levels and types of housing.
- Number of personnel employed and use of consultants and related divisions and affiliates in the development process.
- Number of personnel specializing in the type of labor expected to be committed in the predevelopment, construction and stabilization periods of the project required for the services proposed.
- Experience in working with local government permitting agencies.
- Organization affiliations and licenses held which pertain to the work anticipated.

Firm Experience and Expertise. Provide a detailed explanation of the experience and expertise of the firm to include that of a general nature, and specific examples of expertise related to local governmental permitting public agencies, and that which pertains specifically to the envisioned project and the following:

- Experience with multi-unit housing development, with specific attention to market rate housing (above 200% area median price levels), work force housing (81% to 200% of area median income levels), rental housing at and below 80% of area median income, and low, very low, and special needs housing (at and below 60% of area median income rent levels), in Southern California, Santa Barbara County, notably the South Coast of Santa Barbara County.
- Knowledge and experience with inclusionary housing, incorporation of bonus density provisions in developments, utilization of federal, State, and local governmental funding sources, and other governmental and charitable incentives and provisions to foster the affordability of completed developments (specify).
- Experience with Transit Oriented Development, including measurable reductions in automobile usage, reduced parking requirements, improved walkability scores, improved transit, car-sharing, bicycling and related outcomes.
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- Experience anticipating and proactively managing public outreach and substantial community involvement in recent development projects.

- Experience with local decision-making bodies (County of Santa Barbara), public agencies (including Army Corps of Engineers, CA Department of Fish and Wildlife, Regional Water Quality Control Board, County Flood Control), service districts (e.g., Goleta Water District, Goleta Sanitary District), and other community agencies.

- Knowledge and understanding of California Environmental Quality Act (CEQA) and experience managing large residential projects’ environmental analysis and approval.

- Project and construction management process anticipated for the envisioned project, including budgeting and economic feasibility, consultants needed and provisions for their management, management of architects and engineers for design and construction plans and documents, provisions for selection of general contractor and sub-contracting, provisions to develop, track, and maintain scheduling commitments, contractor management given the limited size of the southern Santa Barbara County construction labor force and unusual demands being faced, etc.

- Breadth and depth of experience for pro forma development sources and uses schedules, projected operations and demonstration of initial and on-going feasibility, including life cycle-costing and principles to establish and maintain adequate reserves for high quality maintenance of completed products.

- Financial expertise, demonstrated substantial financial strength and capability, and demonstrated access to types of financing required for the envisioned project.

- Marketing and sales, lease-up and certification of completed residential projects (specific recent experience).

Specific Project Examples. Provide specific examples of completed projects similar in scope, scale, and complexity to the intended project completed by respondent firm or members of the development entity.

Potential Partnership Structure. Describe how the firm and development entity propose a functional partnership with MTD structured in a manner that would minimize financial risk to MTD and maximize the financial return for MTD. Describe specific experience related to similar legal and economic structures successfully completed by your firm or members of the development entity.

Individual Experience and Expertise. Provide a detailed explanation of the experience and expertise of personnel the offeror proposes to use to complete the project with MTD. Include resumes for key personnel mentioned in this section. Key personnel are expected to be committed for the duration of the project. Replacement of such personnel will not be permitted without prior consultation with and approval from MTD.

RFQ SUBMITTAL EVALUATION

It is anticipated that a committee will review all RFQ submittals and provide recommendations to the ad hoc Calle Real Committee of the MTD Board with the goal of identifying a shortlist of candidates to participate in the subsequent RFP. MTD anticipates finalizing the shortlist by
September 11, 2018. MTD will review RFQ submittals based on criteria including those listed below, in the following order of importance:

**Recent Development Experience** – Knowledge and demonstrated experience with housing development on the south coast of Santa Barbara County and within the coastal Southern California region. Includes market rate sales housing, work force housing, market rate rental housing, and low and very low-income housing, Transit Oriented Development, and projects with a public benefit/public use component.

**Development Team/Partnership** – Demonstrated substantial financial strength and record of successful experience of development team and description of potential partnership with MTD.

**Project Management** – Demonstrated ability to manage design, entitlement, and construction processes.

**Public Agency Experience** – Experience and relationships with pertinent public agencies.

**Community Involvement** – Previous successful experience with project related public outreach and community involvement.

**Technical Studies** - Understanding of completed pre-development studies.

As part of the evaluation process, MTD will contact references and may conduct interviews with candidates it determines as likely to be the most qualified. Such interviews are for information gathering and clarification. MTD may conduct interviews in person or by phone. Any candidate requested to be interviewed shall make its best effort to be available within three (3) business days of such request.

**INSTRUCTIONS & REQUIRED DOCUMENTS**

These Solicitation Instructions provide direction on preparing and processing RFQ submittals. Required forms and certifications to be completed and included as part of the submittal are also included. The RFQ consists of the following items.

- Solicitation instructions and scope of work, which is the document presently being read.
- Various forms to be completed as part of the proposal submittal process.
- Attachment 1, comprising a summary of MTD’s Calle Real property.
- Attachment 2, comprising a summary of key findings from the pre-development studies.

In addition, a sample of the MTD Master Agreement may be downloaded from MTD’s website at [http://www.sbmtd.gov/about/doing-business](http://www.sbmtd.gov/about/doing-business). The MTD Master Agreement will be modified as appropriate for this project. Also, this project is expected to be subject to California Public Works regulations, as described at [https://www.dir.ca.gov/Public-Works/PublicWorks.html](https://www.dir.ca.gov/Public-Works/PublicWorks.html).

Candidates should be certain to read all documents in this RFQ in order to prepare proposals correctly and be fully aware of the contractual terms and conditions. Failure of a candidate to follow instructions may result in rejection or disqualification of its proposal, and lack of knowledge of the contract terms shall not excuse it from its obligations.
PRE-SUBMITTAL MEETING (NON-MANDATORY)

There will be a non-mandatory pre-submittal meeting to review the RFQ process and speak with MTD staff on June 26, 2018, at 3:00 P.M. (PDT) in the John G. Britton Auditorium at MTD’s Administrative Offices located at 550 Olive Street, Santa Barbara. This will be the only opportunity for offerors to engage MTD staff in person.

COMMUNICATIONS, REQUESTS & CLARIFICATIONS

MTD will consider requests for clarifications or changes to the RFQ through July 12, 2018, at 5:00 P.M. (PDT). To be considered, such communications must be via email to Steve Maas at smaas@sbmtd.gov. Change requests must be provided with sufficient information supporting the request to allow MTD to make a fair and reasonable determination.

RFQ MODIFICATIONS & ADDENDA

MTD reserves the right to amend this RFQ through written addenda. No other form of communication with any officer, employee or agent of MTD shall be binding upon MTD. Addenda will be posted to the MTD website at http://www.sbmtd.gov/doing-business and concurrently sent via email to all parties on the interested party list or that previously received the RFQ. Failure of an offeror to receive any addendum shall not relieve it from any obligation under the RFQ as clarified or modified.

RFQ & CONTRACT TERMINOLOGY

In this solicitation and the resultant contract, MTD may interchangeably use the terms “bid,” “offer,” “proposal” or “submittal” to mean your response to this solicitation. Also, MTD may interchangeably use the terms “bidder,” “offeror,” “submitter” “proposer”, “candidate” or “developer” meaning you as the responder to this solicitation. In addition, the terms “successful bidder,” “successful offeror,” “successful proposer,” “successful submitter,” “supplier,” “vendor,” “consultant,” “firm”, and “developer” have the same meaning as the party to which a contract is awarded.

SUBMITTAL PREPARATION & SUBMISSION

Offeror Information—Submittal shall include the fully completed Offeror (Firm and Development Entity) Information form included in this RFQ.

References & Suppliers—Submittal shall include the References & Suppliers form included in this solicitation. Note that only the “Work References” and “Credit References” sections are required for this solicitation. Please be certain to list contact names and phone numbers that are accurate and current.

Lobbying Certification—Submittal shall include the signed and dated Lobbying Certification form included in this RFQ. The form prohibits the offeror from using federal funds to lobby federal officers or employees.

Acknowledgement of Addenda—Offeror shall acknowledge either receipt of each Addendum or that there were no addenda by including in its response the fully completed and signed Acknowledgement of Addenda form.
SUBMITTAL LOCATION & DEADLINE

Offeror shall submit a total of five (7) complete sets of its proposal. This shall include one (1) set marked as original, three (5) complete copies, and one (1) electronic set (flash drive or CD) submitted in a non-transparent, sealed envelope or appropriate packaging plainly marked on the exterior with the name of the offeror and the following: "Development of MTD Calle Real Property RFQ." If using US Mail or a delivery service, submittals must still be enclosed in the specified packaging within any delivery service packaging. Submittals shall be delivered to:

Santa Barbara Metropolitan Transit District
Development of MTD Calle Real Property RFQ
550 Olive Street
Santa Barbara, CA  93101

If hand delivered, submittals should be taken to the reception desk on the 2nd floor of the building where they will be logged in. Submittals will be accepted until August 7, 2018, at 4:00 P.M. (PDT). Unless due to the fault of MTD, submittals received after such time cannot be considered and will be returned to the offeror unopened. There will be no public opening of submittals at the deadline or otherwise.

WITHDRAWAL OF SUBMITTALS

An offeror may withdraw a submittal any time prior to the submittal deadline by submitting a written request executed by the offeror’s authorized representative. Any such withdrawal does not prejudice the right to resubmit a submittal by the submittal deadline.

SUBMITTAL STIPULATIONS

Proposals submitted as a result of this solicitation become the property of MTD. MTD will not pay any cost incurred by an offeror resulting from preparation or delivery of its submittal. MTD reserves the sole right to review, accept, or reject submittals; or to cancel this solicitation in whole or in part if it is in MTD’s best interest to do so. Submittals will remain valid for 90 calendar days following the submittal due date.

OFFEROR RESPONSIBILITY

When MTD determines the offerors within the competitive range (i.e. the offerors who submitted the most highly rated proposals), MTD will assess their responsibility, which in this solicitation is defined as satisfactory performance in previous contracts and having the financial capacity to undertake the project. MTD will use the reference information provided in the submittal and other information, as needed, for this determination. If an offeror within the competitive range is not determined to be responsible, it will no longer be considered.
PHASE 2: RFP

RFP CONSIDERATION REQUIREMENTS (For Shortlist Invitees)

As discussed above, the RFQ process and evaluation will result in a short list of candidates who will be invited to submit development proposals that shall include the following:

Development experience with southern Santa Barbara County. Development entity applications are encouraged to include participants with south county experience or regional comparable project size and type projects.

Conceptual project plans. Includes, but not limited to, site plan, number and type of residential units, consideration of pre-development studies and site constraints, access and circulation, necessary public improvements, and consideration of requirements of Eastern Goleta Valley Community Plan Policy LUR-EGV-2.5, including a range of unit types and income levels. MTD anticipates market rate units proposed along the northern boundary of the property adjacent to the existing Forte Ranch residential development and units targeted for various incomes ranges proposed as the property transitions to the southern boundary adjacent to Calle Real.

Preliminary Water Use Assessment. Provide estimated annual water use calculated in acre feet per year based on conceptual project plans.

Team. Identification of development team, including design and entitlement, general and sub-contracting team, marketing, sales, lease-up and management teams and description of related experience.

Anticipated scope of work. Includes design development, discretionary entitlement processing, ministerial entitlement processing, construction management, sales and lease-up, and management of finished project. Demonstration of timeline and dependencies.

Financial and Legal Information. Describe method of financing the project without encumbering title to the land or equivalent alternatives.

Preliminary pro formas. Prepare schedules showing all project sources versus all project uses of funds, income levels for sales products and rent levels for leased products, operating costs and assumptions, and projections of returns for MTD and the development entity over time. Discuss available cash unencumbered equity of the firm and the development entity and levels of assurance, indemnity, guarantees, bonding and financing available.

Preliminary project schedule. Explain assumptions and capabilities, as well as contingencies, in building the most probable times for completion of major milestones of the project.

Description of proposed partnership with MTD. Notably, how ownership of the land and improvements at all stages of development, completion and operation is to be structured, for the purpose of showing how risk to MTD will be minimized and how MTD will realize long term financial gain.
ANTICIPATED RFP SUBMITTAL EVALUATION

It is anticipated a sub-committee of the MTD Board of Directors will review all RFP submittals and provide recommendations to the MTD Board. MTD will review RFP submittals with consideration of a point system based on the criteria listed below, in the following order of importance:

- Evaluation of MTD financial return and risk
- Financial capability and access to financing
- Experience with housing projects on the South Coast of Santa Barbara County
- Evaluation of development team
- Evaluation of conceptual plan
- Experience with community involvement

Results of this evaluation will not be the sole deciding factor in MTD’s selection of a successful candidate.

Proposers must agree to the following:

- Candidate’s willingness to accept the conditions included in the MTD Master Agreement and the State of California Provisions for Public Works Projects. If there are any contract terms that the offeror will not accept or proposes modifications to, note that MTD is limited in its ability to alter the terms and will assess whether it would be able to contract with the offeror under the offeror’s proposed contract revisions.

- Candidate’s ability and willingness to obtain insurance meeting the requirements indicated in paragraph 18 of the MTD Master Agreement.

MTD will evaluate development proposals and establish an exclusive right to negotiate terms of an agreement with the selected development entity. In order to expedite approval of a water allocation from Goleta Water District, MTD anticipates submittal of a water service application based on conceptual project plans and the candidate submitted Preliminary Water Use Assessment while formal terms of an agreement are being negotiated.

Candidate would be responsible for all costs and risks associated with design, the entitlement process and all related public agency fees and deposits, construction, marketing, and sales; i.e. all necessary components of developing and occupying a multi-unit housing project in unincorporated Santa Barbara County. MTD will retain no liability in the event approved entitlements do not result in a financially feasible project and MTD’s title to the site will not be encumbered.
PRE-AWARD DELIVERABLES

Upon determination of the most qualified, responsible offeror with a fair and reasonable proposal and prior to consideration of contract award, MTD will request the following from the offeror:

Insurance Certificate—A certificate of insurance showing the coverage types and dollar limits stipulated in paragraph 18 of the MTD Master Agreement.

CONTRACT AWARD

Upon completion of the RFP phase of the solicitation and determination of the most qualified, responsible candidate with a fair and reasonable proposal satisfactorily providing the items required, staff will prepare a recommendation for establishing exclusive rights to negotiate to be considered by either the MTD General Manager or the MTD Board of Directors.

If the recommendation is approved, it is the intent of MTD to execute the contract documents as soon as practicable after such approval. The contract will be composed of the Federal Transit Administration Contract Provisions, the MTD Master Agreement, and relevant portions of the Contractor’s submittals and price proposal.
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OFFEROR INFORMATION

General Information
Business Name of Offeror: ________________________________________________

Business Type:  □ Corporation (State of Incorporation: _____)  □ Partnership
  □ Sole Proprietorship  □ Other: ________________________________

Business Federal Tax ID Number: ___________________________ (provide SSN if sole proprietorship)

Corporate Headquarters
Street Address: __________________________________________________________
City: ____________________________ State: _____ Zip Code: ____________

Local Office  □ (check box at left & leave below blank if the local office is the HQ or there is no local office)
Street Address: __________________________________________________________
City: ____________________________ State: _____ Zip Code: ____________

Authorizing Contact  (person authorized to bind the firm contractually, including change orders)
Name: ____________________________ Title: _______________________________
Location:  □ HQ  □ Local Office  □ Other: ________________________________
Telephone: ____________________ Cell: ____________________ E-Mail: ______________

Project Manager  (anticipated primary contact during implementation of projects)
Name: ____________________________ Title: _______________________________
Location:  □ HQ  □ Local Office  □ Other: ________________________________
Telephone: ____________________ Cell: ____________________ E-Mail: ______________
REFERENCES & SUPPLIERS

Credit References
Include your primary bank and two firms that you currently purchase materials or services from on credit:

Bank Name: __________________________ Contact: __________________________ Phone: ____________
Vendor Name: __________________________ Contact: __________________________ Phone: ____________
Vendor Name: __________________________ Contact: __________________________ Phone: ____________

Work References
Include three recent clients for which you provided similar services to the project work:

Client Name: __________________________ Contact: __________________________ Phone: ____________
Client Name: __________________________ Contact: __________________________ Phone: ____________
Client Name: __________________________ Contact: __________________________ Phone: ____________

Suppliers
Provide the following information for any significant suppliers to be used in the project:

Firm: __________________________ Contact: __________________________ Phone: ____________
Description of Work: ___________________________________________________________

Firm: __________________________ Contact: __________________________ Phone: ____________
Description of Work: __________________________________________________________

Firm: __________________________ Contact: __________________________ Phone: ____________
Description of Work: __________________________________________________________

Firm: __________________________ Contact: __________________________ Phone: ____________
Description of Work: __________________________________________________________

Supplier not applicable to Phase 1: RFQ of this solicitation
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
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ACKNOWLEDGEMENT OF ADDENDA

The undersigned acknowledges the Offeror’s receipt of the following addenda to this RFQ and has incorporated information or changes in said addenda within its submittal (if no addenda were received, write “None” in the first blank):

Addendum No.  _____  dated  _______________________
Addendum No.  _____  dated  _______________________
Addendum No.  _____  dated  _______________________
Addendum No.  _____  dated  _______________________

Note: It is the Offeror’s responsibility to ensure it receives all addenda which are posted on the MTD website at http://www.sbmtd.gov/about/doing-business

________________________________  __________________________
Authorized Official Signature       Date of Signature

________________________________  __________________________
Authorized Official Name            Authorized Official Title

________________________________
Business Name of Offeror

(Signer must match authorized official shown on Offeror Information form)
Attachment 1

Summary of Santa Barbara Metropolitan Transit District Property - 4678 Calle Real

Location: On the north side of Calle Real and between San Antonio Road and Dexter Drive, adjacent to the Santa Barbara County Government Complex and near the Turnpike off ramp from Highway 101. The land is rectangular in shape containing approximately 1,320 feet of Calle Real frontage and a uniform depth of about 600 feet. See attached aerial maps.

Parcels: The property consists of four parcels totaling approximately 18.93 acres: (1) APN 59-140-004 – 8.85 acres; (2) APN 59-140-005 – 4 acres; (3) APN 59-140-006 – 4.66 acres; and (4) APN 67-230-026 – 1.42 acres. See attached Assessor Parcel maps.

Purchase History: Santa Barbara Metropolitan Transit District (MTD) purchased the property in 1985 for the purpose of potential bus terminal or transit site. Another site was acquired for that purpose instead and MTD started to focus its efforts on developing the property for residential purposes.

Zoning History: When MTD purchased the property in 1985 all four parcels were zoned residential. As a part of the 1993 Community Plan process three of the parcels were downzoned to Agriculture – A-1-5. Although some row crop farming did occur on the property years ago, the property is currently vacant and has not been farmed for at least a decade. An effort to rezone the property back to residential began in 2008 with the Eastern Goleta Valley Community Plan process. Ultimately, after years of effort, the property was designated as one of the two primary housing opportunity sites in the Eastern Goleta Valley Community Plan in 2015 and rezoned Design Residential. Specifically, 10.2 acres are zoned DR-20, 6.8 acres are zoned DR-.2 and the slightly less than 2 acre westernmost parcel remained zoned DR-20 for a total development potential of approximately 230 units, not including bonus density. The split zoning designation does not align with parcel boundaries. All of APNs 59-140-004 and 67-230-026 are zoned DR-20 while only approximately .6 acres of APN 059-140-005 and 1.26 acres of 059-140-006 contain that designation. The remaining 3.4 acres of 059-140-005 and 3.4 acres of 059-140-006 are zoned DR-.2. See attached Zoning Map.

As a partial accommodation for the awkward split zoning, the Eastern Goleta Valley Community Plan contains Policy LUR-EGV-2.5 which recognizes the potential for a future land use and zoning boundary adjustment and states:

MTD and Tatum/School District: The MTD properties (APNs 059-140-004, -005, -006), located at 4678 Calle Real/149 North San Antonio Road . . . shall receive land use designations appropriate for Residential Neighborhood Development. Consistent with
this policy, the MTD properties shall be designated RES-0.33 (west portion, 6.8 acres) and RES-20.0 (east portion, 10.2 acres).

The locations of the boundaries of the designations identified above and associated zones may be modified as part of a General Plan Amendment and Rezone provided the total acreage associated with each designation does not change and the modification furthers the objectives of this policy. A Development Plan for these properties, respectively, shall:

- Plan, design, and propose one project for comprehensive consideration, rather than considering piece-meal proposals for the property.
- Provide Residential Neighborhood development complementary to surrounding uses.
- Cluster development and constrain development envelope(s) appropriately to generate usable public open space, develop recreation resources, and preserve environmental resources.
- Provide multimodal transportation and circulation improvements to generate connectivity with commercial, recreational, and educational/institutional destinations.
- Provide pedestrian and bicycle improvements sufficient to connect residential uses to adjacent commercial, recreational, and educational/institutional destinations.
- Buffer residential uses from impacts associated with Hwy 101 and Southern Pacific Railroad travel corridors.
- Provide landscaping and/or streetscape to enhance community character and multimodal transportation facilities.
MTD – Call Real Property
Summary of Pre-Development Studies
May 2018
**Biological Resources**

*Preliminary Biological Resources Assessment and Constraints Analysis*

*Wetland Delineation and Jurisdictional Determination Report*

*Storrer Environmental Services*

**Environmentally Sensitive Habitat & Jurisdictional Waters & Wetlands**

Land adjacent to the north/south running drainage is identified as Environmentally Sensitive Habitat (approximately 2.6 acres – coast live oak woodland, arroyo willow thicket, and western ragweed meadow). Portions of this same area meet parameters necessary to be determined U.S. Army Corps of Engineers non-wetland waters, California Dept. of Fish and Wildlife streambed, California Dept. of Fish and Wildlife wetland, and County of Santa Barbara wetland.

Prescribed setback is 50 feet in urban area; from top-of-bank or edge of riparian vegetation (whichever is further). Generally, avoidance is encouraged but mitigation and/or restoration may be proposed to offset impacts. Improvements impacting the drainage may require approvals by Army Corps of Engineers, CA Department of Fish and Wildlife, & Regional Water Quality Control Board, in addition to County of Santa Barbara.

**Special Status Plant Species**

One special status plant species found – southern California black walnut.

Individual coast live oak trees exist.

Potential impacts to plant species and trees - avoidance is encouraged but mitigation and/or restoration may be proposed.

**Special Status Wildlife**

No special status wildlife have been observed.
Traffic Generation/Public Improvements

Traffic and Circulation Assessment for the MTD Calle Real Residential Project
Associated Transportation Engineers

Based on 233 multi-family units – Trip generation estimates calculated using rates for Multi-Family Housing presented in Institute of Transportation Engineers Trip Generation Manual.

Project-Specific Potential Roadway impacts

Project not anticipated to cause roadway segments to exceed acceptable capacities.

Project-Specific Potential Intersection impacts

Addition of project traffic would not generate significant project-specific impacts to study area intersection based on County thresholds.

Note U.S. 101 SB Ramp/ Turnpike Road intersection is approaching LOS D during the AM per hour. Also note El Sueno/101 NB Ramp is LOS C.

Cumulative Roadway Impacts

Under cumulative conditions, project not anticipated to cause roadway segments to exceed acceptable capacities.

Cumulative Intersection Impacts

Project not anticipated to generate significant cumulative impacts to key study area intersections.

Note U.S. 101 SB Ramp/ Turnpike Road intersection is approaching LOS D during the AM per hour.

Site Access and Circulation

County staff indicates access should be taken from San Antonio Road and Dexter Drive; secondary connection to Calle Real near middle of site could be considered.

Calle Real Frontage Improvements – Full frontage improvements required (curb, gutter, sidewalk). Calle Real would not need to be widened but would need to provide eastbound left-turn lanes at any site access connection.

San Antonio Frontage – Additional widening not required.
Traffic Generation/Public Improvements - Continued

Undergrounded Utilities and Street Lights

Utilities along Calle Real would need to be undergrounded. New street lights required on Calle Real and San Antonio.

Traffic Signals

No new traffic signals anticipated.

On-site Circulation

Internal roadways should be designed to accommodate on-street parking on both sides of streets with minimum width of 36 feet; must accommodate pedestrians and bicycles. Constructed as private streets and maintained by the development.
Archaeology

Phase I Archaeological Study
Applied EarthWorks, Inc.

Consultant recommends an Extended Phase I archaeological study along San Antonio Road to test for buried archaeological deposits. Related to an existing archaeological site on the east side of San Antonio Road. Extended Phase I would utilize a backhoe to excavate trenches and include observations of soils and potential for archaeological deposits.

Consultant noted three debris piles likely associated with former structures (modern and historical refuse and construction materials). Related to past agricultural and residential use.

Additional consultation with Native Americans recommended when conceptual plans are available.
Geology

Preliminary Review of Geologic Hazards
Campbell Geo, Inc.

No serious geologic hazards exist.

Artificial fill is present in certain areas, including area adjacent to San Antonio Road. May require removal and recompacktion.

Some debris and trash dumping noted near north property line; one 55-gallon drum was noted.

Low or non-existent threat from tsunami, slope stability, liquefaction, soil creep, or onsite fault rupture.

Low to moderate hazards include erosion, high groundwater, seismic shaking, expansive soils, and undocumented fill.

Recommendations include a detailed geotechnical study that takes into consideration conceptual site development and grading plans and includes subsurface investigation (soil borings and test pits) to confirm depth to groundwater and evaluate hazards. Areas of trash, debris, and undocumented fill can be explored with test pits to determine content and approximate areas of removal. Study would provide grading and construction recommendations necessary for Grading and Building Permit plan checks.
Flood Control/Hydrology

MAC Design Associates

Calculations indicate 100-year storm water may back up to approximately the 78-foot contour line (as water backs up at the existing culvert under Calle Real). Refer to exhibit. Impacted area is generally consistent with Environmentally Sensitive Habitat and wetland delineation.

Consultant indicates “the lowest finish floor elevation should be set above the overland escape elevation of Calle Real should the 48” RCP culvert plug or partially plug, so that the overtopping of Calle Real would occur rather than new residential units being flooded. This exhibit shows the 100-year inundation area to be within approximately 8” of the overland escape elevation of Calle Real, and thus represents the area that the future project would want to avoid or stay above.”

Consultant does not anticipate County Flood Control requiring related physical infrastructure improvements other than perhaps trash racks.

There is no FEMA mapped floodplain, but, consultant indicates this is likely due to the area not having been studied since this is not a blue line stream or watercourse.
Water & Sewer

MAC Design Associates

Water

Two existing water meters – 2-inch agricultural meter at San Antonio Road and 2-inch residential meter at Calle Real.

GWD requires an initial project description and plans with estimated annual water demand calculation (requires unit and fixture counts, irrigation calculations, etc.) to request augmented service allocation under Wright Judgement and receive a Conditional Can and Will Serve letter.

Historical Water Use

Ag meter: 7-year average acre feet per year = 7.23 acre feet per year.

Residential meter: 7-year average acre feet per year = 0.56 acre feet per year.

Sewer

Will be necessary to submit a project description to Goleta Sanitary District to obtain Service Availability letter.
Survey

Waters Cardenas Land Surveying LLP

Note exceptions 7 and 8 in title report and related easement indicated on survey. They are related to a water line, granted to the US Dept. of the Interior Bureau of Reclamation (Cachuma Project). It runs north/south along the boundary of -004 and -005/-006 and along a portion of the northern boundary of -004 and is indicated on the survey as an easement in favor of the United States of America.

Easement language indicates in case of abandonment of said right of way, title and interest cease.