THE CITY OF MONTEREY, CALIFORNIA
REQUEST FOR PROPOSALS

FOR A

COMPATIBLE USE PLAN
(FORMERLY JOINT LAND USE STUDY – JLUS)

FOR THE
PRESIDIO OF MONTEREY, NAVAL SUPPORT ACTIVITY MONTEREY, DEFENSE
MANPOWER DATA CENTER MONTEREY BAY,
FORT HUNTER LIGGETT, AND CAMP ROBERTS

Issued: January 29, 2020
# TABLE OF CONTENTS

I. **INTRODUCTION** ...................................................................................................................................... 3

II. **PROJECT DESCRIPTION** ........................................................................................................................ 4

III. **SCOPE OF WORK** .................................................................................................................................. 13

IV. **PROPOSAL REQUIREMENTS** ................................................................................................................ 21

V. **SUBMISSION OF PROPOSALS** ............................................................................................................... 22

VI. **GENERAL CONDITIONS** ..................................................................................................................... 23

VII. **LIABILITY OF COSTS AND RESPONSIBILITY** ..................................................................................... 24

VIII. **PUBLIC NATURE OF PROPOSAL MATERIAL** ..................................................................................... 24

IX. **VALIDITY** .............................................................................................................................................. 24

X. **STANDARD AGREEMENT** ...................................................................................................................... 24

XI. **PERMITS AND LICENSES** .................................................................................................................... 25

XII. **ORAL AND WRITTEN EXPLANATIONS** .............................................................................................. 25

XIII. **PROPOSER'S REPRESENTATIVE** ......................................................................................................... 25

XIV. **INSURANCE** ....................................................................................................................................... 25
I. INTRODUCTION

The City of Monterey (“City”) is seeking proposals from qualified firms to prepare a Compatible Use Plan (CUP), formerly referred to as a Joint Land Use Study (JLUS), for the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett, and Camp Roberts to address the encroachment and compatibility issues confronting both the civilian community and the installation (Figure 1). The City received a grant from the Department of Defense (DoD) Office of Economic Adjustment (OEA) to conduct the CUP to support the long-term sustainability and operability of the military installations and supported activities.

Interested firms must demonstrate knowledge and experience in military installation management and operations, community planning, development and land use issues including mission and physical/functional encroachment, fiscal impact analysis, economic development, environmental permitting, regional air quality attainment, natural resources, infrastructure, noise management, and communication and coordination collaboration. Previous experience and familiarity with the City of Monterey, Monterey County, and these installations and their missions; preparing CUPs; and successful completion of projects in the CUP study area are highly desirable.

Purpose of the Study

The neighborhoods surrounding the Presidio of Monterey and Naval Support Activity Monterey facilities are generally built out, with the exception of the three mixed use/commercial areas identified as the City’s future growth areas. Compatible development is essential to sustain the military mission. A goal of this CUP is to identify encroachment and compatibility issues confronting both the civilian community and the installation - and to recommend strategies to address the issues for jurisdictional implementation in the context of local comprehensive planning programs. This must be accomplished in a harmonious manner that protects communities while sustaining the military mission by ensuring compatible land use within the sphere of influence. Relations between the localities and the military facilities are excellent, and the CUP, while produced by and for the local jurisdictions, is intended to benefit both the local community and the military installations.

Fort Hunter Liggett and Camp Roberts, at the very southern end of Monterey County, exist in a much more rural environment than the Presidio of Monterey, Naval Support Activity Monterey, and Defense Manpower Data Center Monterey Bay, which are located in the coastal region of the Monterey Bay. However, by the very nature of their maneuver training missions, functional encroachment could be a much larger issue for these facilities than on the Monterey Peninsula and needs to be studied thoroughly. Further, the installations on the Monterey Peninsula and in South Monterey County have very different missions and needs that will require a comprehensive understanding of military operations in order to effectively and accurately identify potential encroachment and compatibility issues (e.g., intellectual compared to functional encroachment issues).

The overall goals of this CUP are to:

1. Identify current and potential land use, functional, intellectual, and radio frequency encroachment issues affecting both the civilian communities and the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett and Camp Roberts
installations through research and public outreach, and recommend strategies to address these issues in the context of local comprehensive planning programs.

2. Identify actions that jurisdictions can pursue to ensure that incompatible development does not impact Mission Readiness and the operational utility of the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett, and Camp Roberts installations.

3. Enhance and protect the human and physical environments.

4. Identify and address any and all issues associated with compliance of the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett, and Camp Roberts installations with the Sustainable Groundwater Management Act, which California passed into law in 2014, and the Cease and Desist Order issued by the State Water Resources Control Board issued in 2009, as applicable.

5. Identify and address any and all issues associated with critical infrastructure (e.g., communications, 5G, bandwidth, and capability to support big data, water, sewage, electricity, k-12 education, workforce housing, etc.).

6. Identify and address any and all issues with respect to recruiting and retaining qualified personnel to staff missions, such as Defense Language Institute Foreign Language Center (DLIFLC), Naval Postgraduate School, Defense Manpower Data Center Monterey Bay, Fleet Numerical, Army Data Analytics, and Defense Personnel and Security Research Center (PERSEREC).

7. Analyze and address protecting the viability of current and future missions at the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett and Camp Roberts installations, while at the same time guiding growth, sustaining the economic health of the region, and protecting public health, safety and welfare.

8. Compile and summarize the economic impacts by the federal installations on the economy of Monterey County.

9. Create an action plan to guide future planning from which all involved parties will benefit.

The CUP’s overall objectives, which support the above stated goals, are:

1. Involve the public and other stakeholders in all stages of the planning process.
2. Map recent and planned development activity.
3. Identify a range of factors that identify current and anticipated mission encroachment.
4. Identify areas where present land use conflicts are occurring.
5. Identify areas where future land use conflicts could occur, based on the status and trends analyses, and applicable General Plan and development regulations as well as projected military mission growth.
6. Identify new land use compatibility measures.
7. Develop strategy and specific plans to ensure that the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett and Camp Roberts installations achieve consistency with the Sustainable Groundwater Management Act.
8. Recommend potential changes to the local government growth policies and/or land use regulations.
9. Develop a final action plan and narrative report with specific recommendations and implementation strategies.
10. Identify potential measures to integrate the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett, and Camp Roberts installations’ technical documents into regional planning strategies.
11. Identify infrastructure deficits or needs in local plans that could impact the mission and operational efficiency of the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort Hunter Liggett, and Camp Roberts installations.
12. Consider the implications of emerging technologies (e.g. new modes of transportation or communications) on the shared infrastructure of the Army, Navy and surrounding jurisdictions.

II. PROJECT DESCRIPTION

The proposed CUP will assemble data and information to address compatible use issues relating to the Presidio of Monterey, Naval Support Activity Monterey, Defense Manpower Data Center Monterey Bay, Fort
Hunter Liggett and Camp Roberts installations, their missions and the growth potential of the participating jurisdictions. Policies and activities on both sides of the installation boundaries must be studied and evaluated, and recommendations regarding any needed adjustments must be made to meet the needs of the military and the surrounding and nearby localities that are impacted by installation activities.

Military Partners

The principal Military partners are:

1. Presidio of Monterey, located on the Monterey Peninsula and on the former Fort Ord, and home to the Defense Language Institute Foreign Language Center (DLIFLC), the Defense Manpower Data Center Monterey Bay (DMDC-MB), the Defense Personnel and Security Research Center (PERSEREC), the Army Analytics Group (AAG), and the Ord Military Community (OMC).

2. Naval Support Activity Monterey (NSAM), located on the Monterey Peninsula, and home to the Naval Postgraduate School (NPS), Naval Research Laboratory Marine Meteorology Division (NRL-MRY), Fleet Numerical Meteorology and Oceanography Center (FNMOC), and Defense Resource Management Institute (DRMI). Naval Support Activity Monterey also hosts the National Weather Service (NWS) Forecast Office for Northern California on the Navy School Annex.

3. Fort Hunter Liggett, located at the very southern end of Monterey County, which provides training for combat support and combat service support units of the Army Reserve, and other training opportunities to all branches of the U.S. military and allied nations.

4. Camp Roberts Maneuver Training Center, straddling the border between Monterey County and San Luis Obispo County, facilitates the training, mobilization and security of the National Guard, Army Reserve and active-duty Army units. Camp Roberts is also home to the Army’s 514th Signal Company Satellite Communications (SATCOM) facility, one of the most important DoD communications nodes in the entire Continental United States. A JLUS Study for Camp Roberts was completed in 2012 and will be amended as a part of this regional study.

The City of Monterey will work with the elected officials from partnering counties, cities, and tribes to convene a CUP Policy Committee and a CUP Technical Committee.

Presidio of Monterey

Installation Overview

The Presidio of Monterey ("Presidio") is an active Army installation consisting of 392 acres located in the City of Monterey. The Presidio owns (144) and leases (64) buildings with over 2.0 million square feet (sf) configured to satisfy a broad range of needs with a Plant Replacement Value (PRV) of approximately $685 million. In addition to purpose-built facilities to support academic and applied instruction and specialized language and cultural immersion programs, there is a Sensitive Compartmentalized Information Facility (SCIF). As of September 30, 2014, there were 4,531 military members (Active and Reserve Component) of all Services and 2,622 DoD Civilian personnel assigned to the Presidio.

History

The Presidio was established as the 1st of 4 presidios (forts) in California on June 3, 1770, the day Spain took possession of a portion of the western American coast. The original Presidio was built in 1792 and consisted of a small fort with 11 cannons on land now part of the installation. The modern Presidio began as an infantry installation in 1902 as the Monterey Military Reservation; experienced a number of name changes; was inactivated in 1944 and reopened in 1945 to support civil affairs soldiers preparing for the occupation of Japan; and became home to the “Military Intelligence Service Language School,” the organization that would become the Army Language School (ALS) in 1947. Through a series of reorganizations of DoD and Service language
training schools, the Defense Language Institute Foreign Language Center (DLIFLC) was established at the Presidio in 1976. From 1940 until 1992, the Presidio was a sub-installation to Fort Ord. In September 1994 Fort Ord closed as a result of a 1991 BRAC Commission decision, and the Presidio garrison was re-established as the installation host command under the Army Training and Doctrine Command (TRADOC). In October 2006, the Presidio Garrison, along with all other Army garrisons, was realigned under the Army Installation Management Command (IMCOM).

Current Mission

The primary mission allocated to the Presidio includes the Garrison Command that provides host support garrison activities, assigned tenants and associated Service offices, such as the DMDC-MB located 10 miles north in the Ord Military Community.

The Garrison Command provides infrastructure, facility and support services to enable mission readiness and enhance the quality of life for the Monterey Military Community and its Families. The Command also supports DoD activities as far north as Benicia, CA, and the U.S. Army Satellite Communications (SATCOM) facility located 104 miles south at California Army National Guard Maneuver Training Center, Camp Roberts. The Presidio and City apply a long-term engagement approach, the “Monterey Model” and current Inter-Governmental Support Agreement (ISGA), to develop a relationship between the local government and its military installation, providing a nationwide benchmark for public-public partnerships and base operations.

Defense Language Institute Foreign Language Center (DLIFLC)

DLIFLC is an Army activity chartered to “provide culturally based foreign language education, training, evaluation and sustainment to enhance the security of the nation.” The DLIFLC mission executes DoD Policy that states, “Foreign language skills, regional expertise, and cultural capabilities are enduring critical competencies essential to the DoD mission…” The Secretary of the Army is the DoD Executive Agent for DLIFLC.

History

When the Presidio of Monterey was reactivated in 1945 to support civil affairs soldiers preparing for the occupation of Japan, it became home to the “Military Intelligence Service Language School,” the organization that would become the Army Language School (ALS) in 1947. Through a series of reorganizations of DoD and Service language training schools, the DLIFLC was established at the Presidio in 1976.

Current Mission

In addition to its resident program serving approximately 3,500 students from all Services, DLIFLC supports non-resident programs and 25 “point of need” detachments worldwide to ensure language expertise throughout military members’ careers. Resident Courses for 23-25 languages (specific languages offered vary depending upon national security needs) are grouped in categories with each curricula’s duration determined by language complexity.

Defense Manpower Data Center Monterey Bay (DMDC-MB)

Headquartered in Washington, D.C., DMDC-MB operates seven major offices in the United States, Germany, South Korea and Southwest Asia. DMDC-MB Monterey is the second largest DMDC-MB activity and led by the Deputy Director. It is also the repository of DMDC-MB’s Person Data Repository (PDR) that holds information on 50 million people including, but not limited to, officer candidates, all rank active duty military, military retirees, foreign military, families, veterans, patients, DoD and Non-DoD Civilians, and contractors. In addition to the PDR, DMDC-MB maintains Local Population Databases and files with information on millions of additional people.
History

DMDC-MB was founded as the Manpower Research and Data Analysis Center (MARDAC) and made a tenant activity within the Department of the Navy in 1974. Over the last 42 years, its name, organization, reporting chain of command and location within the DoD organizational framework have changed, but its mission has not changed – to support the information management needs of the Under Secretary of Defense for Personnel & Readiness (USD P&R).

Current Mission

DMDC-MB is an activity of the USD P&R, and a Defense Human Resource Activity responsible for “collating personnel, manpower, training, financial, and other data for DoD. This data catalogues the history of personnel in the military and their family for purposes of healthcare, retirement funding, and other administrative needs.” Primary business lines are Decision Support; Entitlements, Benefits and Readiness Reporting; Personnel Identification, Validation and Authentication; and Enterprise Integration.

Naval Support Activity Monterey (NSA Monterey/NSAM)

Installation Overview

NSA Monterey provides support to more than 15 supported commands including the Naval Postgraduate School (NPS), Naval Research Laboratory (NRL), and the Fleet Numerical Meteorology and Oceanography Center (FNMOC). NSAM Monterey Main Site consists of 198 facilities and approximately 627 acres. It also provides oversight to Special Areas in San Luis Obispo, Santa Clara, Santa Cruz, and Solano Counties as well as a site in Magna, Utah. The approximate PRV for NSA Monterey is estimated at $721 million as of December 2018, and its daily population, including tenants, is approximately 3800 people which can vary based on NPS student body numbers.

NRL is the Navy’s full-spectrum corporate laboratory, conducting a multidisciplinary program of scientific research and advanced technological development. FNMOC provides the highest quality, most relevant, and timely worldwide meteorology and oceanography support to the United States and coalition forces from their operations center (available 24 hours a day, seven days a week).

History

NSA Monterey was established in 2010 and replaced the former Navy Region Southwest Naval Support Detachment, and it reports to Commander, Navy Installation Command (CNIC) via Commander, Navy Region Southwest in San Diego, CA. The history of NSA Monterey’s primary tenants – NPS, NRL-MRY and FNMOC will be discussed in the appropriate sections that follow.

Current Missions

NSA Monterey provides host command support to DoD and non-DoD activities, and mission areas include operational support; public safety; environmental compliance and conservation; facility management, sustainment, restoration and modernization, and quality of life services. The primary tenants allocated to NSA Monterey include the installation proper, NPS, FNMOC, NRL-MRY and DRMI.

Naval Post Graduate School (NPS)

NPS provides unique graduate-level education to military and civilian service members of DoD and International partners. NPS supports both resident and distance learning students and programs through a combination of tenure, tenure-track, non-tenured and military faculty and staff.
History

NPS evolved from the School of Marine Engineering established by the Secretary of the Navy’s signature of General Order No. 27 on June 9, 1909, at the U.S. Naval Academy under the direction of the Naval Academy Superintendent. In 1912, the school was renamed the Postgraduate Department of the Naval Academy and courses in gunnery, communications, construction and civil engineering were added to the original marine engineering curriculum. Following a review of the role of graduate education in the Navy and determination the facilities at the Naval Academy would not be adequate, Congress enacted legislation to make the school a fully-accredited, degree-granting graduate institution. In 1951, the Naval Postgraduate School at the Naval Academy moved from Annapolis into the former Hotel Del Monte in Monterey.

Current Mission

The Naval Postgraduate School provides relevant and unique advanced education and research programs to increase the combat effectiveness of commissioned officers of the naval service to enhance the security of the United States. In support of the foregoing and to sustain academic excellence, NPS fosters a program of relevant and meritorious thesis and research experiences for NPS students that informs the curricula, supports the needs of Navy and Department of Defense, and builds the intellectual capital of NPS faculty. To support the core Navy mission, NPS’ programs are inherently joint, inter-agency, and international.

The average number of degree-seeking students in residence during Academic Year (AY) 2017 was 2,697 categorized as 41% Navy, 12% Army, 12% International students representing 53 countries, 15% Marine Corps, 13% Government Civilians, 6% Air Force and 1% Coast Guard and other. NPS offers over 59 degree programs and awarded 1,433 Doctorate, Master or Engineering degrees in AY 2017.

Naval Research Laboratory Marine Meteorological Division (NRL-MRY)

NRL-MRY is part of the research laboratory for the Navy and Marine Corps – the Naval Research Laboratory (NRL), headquartered in Washington, DC. NRL-MRY is one of six (6) divisions in the NRL’s Ocean and Atmospheric Science and Technology Directorate. It is located adjacent to FNMOC in an enclave approximately three (3) miles from NSAM headquarters.

History

The Marine Meteorology Division (MMD) was established in Norfolk, VA, in October 1950 as part of NRL’s Project AROWA (Applied Research; Operational Weather Analysis) to find ways to leverage basic meteorological research for practical weather forecasting. As MMD’s mission responsibilities increased and research areas expanded, the name changed several times. In 1971, the Environmental Prediction Research Facility was established in Monterey, CA, to be collocated with NPS and the Fleet Numerical Weather Center (predecessor of today’s FNMOC) “to provide maximum synergy between research and operations and to facilitate sharing of computer resources ….” Following several more mission refinements and additions, the organization was officially designated the Naval Research Laboratory – Marine Meteorology Division in 1992.

Current Mission

NRL operates as the Navy's full-spectrum corporate laboratory, conducting, a broadly based multidisciplinary program of scientific research and advanced technological development directed toward environmental information superiority for the Navy/Marine Corps and DoD. This is translated operationally into three (3) integrated, but distinct elements:

1. conduct basic research to “understand and simulate the behavior of the atmosphere and its constituents on local, regional, and global scales – including its interactions with the ocean, land, cryosphere, and middle atmosphere.”
2. complete **applied research** “to invent, develop and implement new capabilities and systems for objective environmental analysis and prediction.”

3. to serve as the **operational partner** of FNMOC “to integrate new capabilities into automated systems for assessing risk and analyzing impacts of weather on DoD operations.”

NRL-MRY is the only center in the Navy wholly dedicated to atmospheric research and conducts DoD’s only full-spectrum – global to microscale – research program in the atmospheric sciences. NRL-MRY’s research mission is supported by powerful supercomputer systems hosted in a variety of locations.

**Fleet Numerical Meteorology and Oceanography Center (FNMOC)**

FNMOC is located in an enclave with NRL-MRY approximately three miles from the NSAM headquarters. It is the U.S. Navy’s main weather and ocean prediction center and one of seven major global weather prediction centers in the world. It is a subcommand of the Naval Meteorology and Oceanography Command headquartered at the John C. Stennis Space Center, MS. FNMOC serves as a Defense Information System Agency (DISA) Network Node and Hub for 12 DoD organizations on the central California coast. FNMOC has substantial SCIF space and a robust inventory of technological support, including powerful supercomputers for weather and ocean modeling.

**History**

FNMOC’s history began in 1958 when the Navy established the Navy Numerical Weather Problems (NANWEP) Group in Suitland, MD. The NANWEP Group was relocated to the NPS campus in 1959 and renamed Fleet Numerical Meteorology & Oceanography Center in 1993. Responsibilities have increased and evolved with the increased capabilities of computers and application of technological solutions to data requirements. Over the last 61 years, FNMOC and its predecessors have developed, improved, retired and replaced increasingly sophisticated numerical models to provide atmospheric and oceanographic predictions that enable fleet safety and decision superiority.

**Current Mission**

FNMOC’s mission is to “Enable fleet safety and warfighting effectiveness of Naval, Joint and Coalition forces by developing and providing assured Global and Regional Numerical Environmental Prediction and applied decision-making services.” In support of its mission, FNMOC produces a wide range of meteorology and oceanography (METOC) products for DoD including optimum path flight plans, ocean state data, custom weather prediction areas, go/no-go decision tools, tactical decision aids, weapon system inputs to improve performance and accuracy, and a variety of other mission critical METOC data, products and services.

FNMOC operates a unique High Performance Computing (HPC) Center with capabilities to operate throughout all classification levels that make FNMOC the only DoD activity providing METOC support to U.S. and coalition operations and exercises at all classification levels. This HPC Center also supports NRL-MRY computational needs. FNMOC also works with the National Center for Environmental Prediction (NCEP); collaborates with the National Environmental Satellite, Data and Information Service (NESDIS); and ensures continuity of operations (COOP) for NOAA and Air Force meteorological activities.

**Defense Resource Management Institute (DRMI)**

The Defense Resources Management Institute (DRMI) is sponsored by the Secretary of Defense, and designs courses for U.S. and international military officers and senior civilian officials. Participants have come from more than 160 countries. Faculty present executive-level programs in Monterey on a regular basis—tailored courses are also available by specific arrangement in other locations both in the United States and overseas.
History

DRMI was established on the NPS campus by the Office of the Secretary of Defense (Comptroller) in 1965 to take advantage of NPS faculty teaching analytical and business approaches to efficiently use defense resources. Nearly 35,000 individuals – approximately 50% from over 160 foreign countries – have participated in resident programs. Many of its international graduates have become their countries’ leaders, i.e., Kings or Presidents; Ambassadors; Ministers, Vice Ministers or Chiefs of Defense; Chiefs or Deputy Chiefs of their countries’ General Staffs.

Current Mission

DRMI is responsible for conducting “resources management courses that enhance the understanding, competence, and capabilities of U.S. military and civilian personnel, and providing such courses for foreign countries and international agencies ….” It currently provides eight resident courses, two mobile courses and a series of off-site workshops, seminars and online events. Program emphasis is on analytical decision making, not skill training. A multi-disciplinary strategy integrating Management Theory, Economic Reasoning and Quantitative Reasoning is used in all DRMI programs.

Fort Hunter Liggett

Installation Overview

Fort Hunter Liggett, with 165,000 acres, is the largest Army Reserve installation, and is the eighth (8th) largest maneuver installation in the Army. It is located about 150 miles (south) of San Francisco in Monterey County. At the end of FY 2014, the installation’s employee base was comprised of approximately 221 Active and Reserve Component military personnel, 297 civilian employees and over 850,000 student man-days per year. At the end of FY 2013 the installation owned 300 buildings comprising approximately 1.1 million square feet, with a PRV of approximately $732.9 million.

History

In 1940, the War Department purchased over 200,000 acres of local ranch lands between the Salinas River Valley divide and the Pacific Ocean from William Randolph Hearst and adjacent landowners to create an additional training installation in anticipation of becoming involved in World War II. Originally designated Hunter Liggett Military Reservation in 1941, the installation is named for Lieutenant General Hunter Liggett (1857 – 1935), Commander of the 41st National Guard Division, the First Corps of the American Expeditionary Forces during World War I and Chief of Staff for General Pershing. Until it became a sub-installation of Fort Ord in 1952, Camp Roberts administered fort activities.

In 1975, the Hunter Liggett Military Reservation was re-designated as Fort Hunter Liggett Military Installation. In 1993, ownership transferred from the Active Army to the U.S. Army Reserve as part of the Base Realignment and Closure Act. Since 2005, Fort Hunter Liggett has been managed by the U.S Army’s Installation Management Command (IMCOM) and funded by the Army Reserve in order to support year-round, total force training.

Today it serves as a readiness enabler for all U.S. military services and allied forces. Fort Hunter Liggett also supports training for Federal, State and local civilian agencies.

Current Mission

Fort Hunter Liggett provides training for combat support and combat service support units of the Army Reserve, and offers excellent training opportunities to all U.S. military components and those of allied nations. It is exceptionally well suited to host large-scale joint exercises. Installation operations, budgeting and policy for Fort Hunter Liggett are the responsibility of the U.S. Army Installation Management Command and its garrison commander. Major tenant organizations include a variety of training and logistics units.
Camp Roberts Maneuver Training Center (Camp Roberts)

Installation Overview

Camp Roberts is a California National Guard post consisting of approximately 42,814 acres owned by the Department of the Army, licensed to the State of California and operated by the California National Guard. It is about 175 miles South of San Francisco straddling both San Luis Obispo and Monterey Counties. At the end of FY 2014, the installation’s employee population was comprised of approximately 361 Active and Reserve Component military and 64 civilian employees. Annual training load throughput is approximately 15,000. The installation owns 514 buildings consisting of nearly 2 million square feet with a PRV of approximately $987.2 million.

History

Originally named Camp Nacimiento, the installation was renamed in memory of Corporal Harold W. Roberts, a native Californian, who posthumously received the Congressional Medal of Honor for action during an October 4, 1918 tank battle in Montrebeau Woods, France during the Argonne Offensive. It is the only major Army installation named for a non-commissioned officer.

Construction to house and train 23,000 men began in 1940 and by the end of World War II, nearly half a million men had passed through its gates. It was closed in 1946, reopened during the Korean War and Vietnam conflict. It is currently undergoing major renovations, including demolition of World War II-era barracks, which have been plagued with mice, asbestos insulation, and lead paint. Demolition of nearly all the World War II-era structures began in 2012.

Current Mission

Camp Robert’s mission is to facilitate the training, mobilization and security of the National Guard, Army Reserve and Active Component units in support of Federal, State and community missions. It is the host for annual training for most California Army National Guard units. In June 2014, it hosted 5,000 soldiers from California and other western states as part of the largest Annual Training exercise since September 11, 2001. NPS and NRL-MRY also make significant use of testing and training facilities at Camp Roberts to conduct field experiments in support of their R&D programs.

Camp Roberts is also home to the Army’s 514th Signal Company Satellite Communications (SATCOM) facility, one of the most important DoD communications nodes in the entire Continental United States.

Installation operations, budgeting and policy for Camp Roberts are the responsibility of the California Army National Guard and its garrison commander. Several regional training programs, not directly associated with the Annual Training Exercises, are provided at Camp Roberts on an as-needed basis.

Sphere of Influence

The Sphere of Influence (SOI) establishes geographic boundaries to guide the Commanding Officer and Community Planning Liaison Officer in monitoring encroachment challenges. These encompass areas:
- within the installation area of responsibility;
- that Military operations currently impact or where future Military operations could impact;
- where the Military and its stakeholders are in competition for resources; and
- where an action or change could cause encroachment.

A draft SOI was established around each Military land management area by considering:
- Identified encroachment challenges;
- Land Use;
- Topography;
• Critical Areas;
• Zoning and
• Regional Growth Projections.

Two zones were established to differentiate the importance and resulting level of attention recommended within the draft SOI:
1. Immediate Vicinity. Actions in the Immediate Vicinity SOI could affect the installation operations.
2. Proximate Vicinity. Cumulative actions in the Proximate Vicinity may create a long term encroachment issue, such as increasing traffic volumes on military installation access roads.

The installations draft spheres of influence are depicted in the following diagrams:

Figure 1. Map of Installations
Figure 2. Citywide Map of Installations
Figure 3. Presidio of Monterey Sphere of Influence
Figure 4. NSAM Sphere of Influence
Figure 5. FNMOC/NRL Sphere of Influence
Figure 6. DMDC-MB Sphere of Influence
Figure 7. Fort Hunter Liggett Sphere of Influence
Figure 8. Camp Roberts Sphere of Influence

**Involvement of Other Jurisdictions**

The anticipated study area for this regional CUP includes, but is not limited to:

- City of Monterey
- City of Pacific Grove
- City of Seaside
- Monterey County
- San Luis Obispo County

Landowners and stakeholders within or adjacent to the study area include, but are not limited to, the following: municipal, federal, and other agencies, most of which have expressed an interest in participating in the CUP process:

**Local**
- City of Pacific Grove
- Monterey County, including Pebble Beach Community Services District
- Transit Agencies (Monterey Salinas Transit, Transportation Agency for Monterey County)
- Monterey Peninsula Airport District
- Monterey Peninsula Unified School District
- San Luis Obispo County

**Federal**
- US Army
- US Navy
- National Weather Service
Tribes
- Ohlone/Costanoan-Esselen Nation
- Santa Ynez Band of Chumash
- Salinans

The proposed approach is intended to maximize the essential participation of these agencies and other stakeholder groups through committee functions, use of a project website, and email.

Public Participation and Education

Two committees will be formed to provide support and guidance during this proposed CUP: 1) a Policy Committee consisting of elected and other appointed public officials, senior military officials and other key stakeholders as required; and, 2) a Technical Committee of professional planners, managers, and technical staff from each of the jurisdictions and other key stakeholders. The committees will be responsible for the overall direction of the CUP, including, but not limited to, review and input on the study design, draft and final written reports, and policy recommendations. The CUP will also contain a major public outreach, awareness and education campaign. An initial CUP visioning session and several public informational workshops will be scheduled and held in the vicinity of the project area at key milestone points in the study for the public to provide input. Use of emails, websites, and the local newspapers will be key components to inform the community of upcoming meetings. The committees will identify specific public areas and neighborhoods to engage with for this CUP. Examples may be:

- Neighborhood Associations;
- Downtown Committees;
- Adjacent and or affected property owners;
- Other as identified

Timeline

The CUP process, from Notice to Proceed (NTP) to the final CUP report, is expected to take 14 months to complete. The schedule for the RFP process is as follows:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Issue of RFP</td>
<td>January 29, 2020</td>
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<tr>
<td>Proposer Questions/Clarifications due</td>
<td>February 7, 2020</td>
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<tr>
<td>City response to Questions/Clarifications</td>
<td>February 12, 2020</td>
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<tr>
<td>Proposals due</td>
<td>4:00 p.m., February 26, 2020</td>
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<td>Finalist Interviews (if required)</td>
<td>March 16-20, 2020</td>
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<tr>
<td>Consultant Notice of Award</td>
<td>March 27, 2020</td>
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<tr>
<td>City Council Contract Approval</td>
<td>April 21, 2020</td>
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<tr>
<td>Consultant Notice to Proceed</td>
<td>April 22, 2020</td>
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</tbody>
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III. SCOPE OF WORK

Project deliverables will include:
1. Public involvement strategy.
2. Informational pamphlets, fact sheets, etc. and a project-specific website for education of the general public, media, and elected officials.
3. Project-specific GIS layers and shape files for use by the various jurisdictions.
4. Conflict identification and land use compatibility maps.
5. Public meeting summaries that document the process of citizen, stakeholder, and elected officials’ comments, suggestions, and observations.
6. Draft and Final Compatible Use Plan reports.
The following Work Plan outlines consultant tasks required to complete the requested deliverables and products. The Work Plan also identifies desired outcomes and work products.

**Task 1 – Overall Project Initiation and Administration**

Task includes making any necessary refinements to the Work Plan and administering the study to ensure coordination with the City and committees. As such, City of Monterey staff will be performing work with the consultant on tasks to review drafts, provide comments, and publish final plans.

**Subtask 1.1 Refine Work Plan**

City of Monterey staff will meet with the consultant to review and refine, as needed, the Work Plan and make any necessary adjustments that will not impact the overall budget and scope of the project. City staff and the consultant will present the final Work Plan before the Policy and Technical Committees for review and recommendation. City staff and the consultant will work cooperatively with Monterey County, San Luis Obispo County, the City of Pacific Grove, and Monterey County/Pebble Beach staff before presenting to the Committees.

**Subtask 1.2 Administration and Management**

The consultant will work with City of Monterey staff to provide administrative support to the Policy Committee and Technical Committee to accomplish the following activities:

- Schedule committee and public meetings.
- Prepare meeting notices, agendas, minutes, handout materials, maps, presentation and any other items to accomplish the study objectives.
- Provide written monthly status reports that detail work in progress, work accomplished, and funds expended. Progress reports are due the 15th of the month following the reporting period for City of Monterey staff review and distribution to study participants.
- Provide written work products and verbal committee briefings at the conclusion of each major phase of the study.
- If necessary, update the Work Plan and milestone completion dates.

**Subtask 1.3 Project Coordination**

The City of Monterey CUP project manager will serve as the principal point of contact, and will coordinate communications with and between State and local agencies, tribes and elected officials, in support of CUP objectives. The project manager will work with the consultant to produce and review all information concerning the CUP, including progress reports, meeting agendas and materials, presentations, and draft and final reports prior to CUP Committee review and prior to public release. Upon the completion of the CUP, all maps (including GIS shape files), data, and reports will be the property of the City of Monterey and will be available in both paper and electronic formats. The City of Monterey will share CUP data and products with area jurisdictions and tribes.

**Task 2 – Community Organization**

In cooperation with the City of Monterey CUP project manager and the Policy Committee, the consultant will support organizational and meeting activities of the Policy Committee. The City of Monterey project manager will be providing work products and support consultant produced presentations and other display products. The City of Monterey project manager will perform initial outreach to existing community organizations, civic groups and neighborhood communities that have an existing and on-going relationship with the City and the study area. To this end, City staff will produce a contact database for consultant use on the various lists of stakeholder groups.

Outreach objectives include providing project leadership roles to CUP partners and associated parties to conduct timely and effective meetings, and cooperatively engage, involve, educate, and provide awareness on
CUP across all issues and affected entities. Due to the complex nature of this CUP and its involvement of counties, local tribes, and incorporated cities, there will be a dedicated effort to ensure that elected leaders, program experts, communities, and stakeholders receive consistent and timely information, and are aware of all opportunities to provide input, review, and comment.

To ensure that these outreach objectives are met, two committees will be formed to provide support and guidance during this proposed CUP: 1) a Policy Committee consisting of elected and other appointed public officials, senior military officials and other key stakeholders as required; and 2) a Technical Committee of professional planners, managers, and technical staff from each of the jurisdictions and other key stakeholders. The committees will be responsible for the overall direction of the CUP, including, but not limited to, the option of forming a Policy Committee and Technical Committee to support each region. The proposal shall also outline how the consultant will facilitate the communication gap between the installations and communities to effectively identify encroachment and compatibility issues.

Task 3 – Stakeholder and Public Involvement

Public participation is an integral part of the CUP planning process to help ensure decisions are made in consideration of public needs, priorities and preferences of proposed outcomes. The City of Monterey maintains a positive reputation with the many public, private, and non-profit groups, agencies and organizations in the study area and as such will work with the consultant on outreach, messaging, briefing, and reporting to these various stakeholder groups. Early and continuous public involvement brings diverse viewpoints and values into the decision-making process. This process enables the participants to make better informed decisions through collaborative efforts and builds mutual understanding and trust among stakeholders and the general public. Successful public participation is a continuous process, consisting of a series of activities and actions to both inform the public and stakeholders as well as obtain input that may influence decisions that affect their lives.

The City will work with the consultant on preparing and implementing the public participation plan, including but not limited to organizing and facilitating meetings, issuing notices, producing outreach materials, and conducting surveys. Conducting meaningful public participation involves seeking public input at specific and key points in the decision-making process where such input has a real potential to help shape the final decision or set of actions. Public participation activities provide more value when they are open, relevant, timely, and appropriate for the intended goal of the public involvement process. Public participation activities will provide a balanced approach with representation of all stakeholders and include measures to seek out and consider the input of all stakeholders.

Subtask 3.1 Public Involvement Strategy

The selected consultant shall prepare a public involvement strategy that covers the key phases during the CUP planning process. The consultant, in consultation with City, will present the strategy before the Policy Committee for input. The public involvement strategy will include the identification of key stakeholders assisted by City of Monterey data, and will lay out a specific schedule and methods of communication tools to provide key project planning information to the following groups:

- Elected Officials
- Tribal Leaders
- Stakeholders
- General Public
• Target Groups (such as major landowners, neighborhood associations, employers, homebuilders, conservation organizations, real estate industry, etc.)
• Media

The public involvement strategy will include a variety of communication tools to facilitate early and continuing outreach to the above groups, such as City of Monterey’s web page, periodic newsletters, project website, media releases/media kits, periodic fact sheets, etc. The consultant shall maintain a contact list, throughout the study process, to mail/e-mail project information materials to interested parties.

As part of the public involvement strategy, the consultant shall set up and periodically update a project website with links to participating entities, project description, schedule, meeting dates, maps, and study results. An opportunity for members of the public to offer emailed comments via the web site should also be available.

Subtask 3.2 Installation Tours

The consultant, working through the City, will coordinate tours of the installations. The purpose of the installation-led tour is for the Policy Committee and Technical Committee members to gain a more comprehensive understanding of the military missions, issues, and constraints imposed through incompatible development. These tours will include tours of the neighborhoods and/or areas that are adjacent to each of the installations.

Subtask 3.3 Public/Elected Officials

The City of Monterey and the consultant will coordinate with affected public and elected/appointed officials. This task involves relationship-building and outreach to local, State and Federal public officials representing the participating jurisdictions who will ultimately be responsible for implementing the CUP recommendations. Through this effort, the process will ensure that the affected legislative bodies, state officials, economic development boards, and State and Federal elected officials are fully briefed and aware of the purpose and goals of the CUP planning process.

Subtask 3.4 Community Visioning in Support of Compatible Use Plan

Visioning is a planning process that may be utilized for the purposes of the CUP process. A specific CUP visioning exercise will be planned and carried out with input from the City and partners. Visioning will target members of the Policy Committee initially. The use of visioning in the broader community and general public will be determined cooperatively with the City and partners. The intent would be to engage a region or neighborhood creating a shared vision for its future with respect to area military operations and installations. Consultant services may be used to facilitate community visioning and ensure that local community values are incorporated into the process. A successful community visioning initiative shares five key characteristics:

1. Understand the whole community and full range of issues shaping the need and purpose for a Compatible Use Plan
2. Reflect on community values
3. Address emerging trends and strategic issues driving the community’s future.
4. Envision a preferred future.
5. Promote local action through a strategic action plan that serves as a community “road map.”

Subtask 3.5 Public Meetings

The consultant, in consultation with the City, will schedule and hold public meetings throughout the study to educate the public about the purpose of the CUP, the CUP planning process, CUP recommendations, and to seek input from the public during key phases of the study. Public meetings will be held at key intervals, including but not limited to:
1) Project Initiation
City of Monterey staff and the consultant will facilitate meetings before the Policy Committee at the beginning of the study to explain the project, goals, and objectives. Public comments will be solicited, including the identification of any perceived conflicts with the installations or military operations, and recommendations for analysis.

2) Interim Findings and Preliminary Recommendations
The consultant will present the results of data collection and analysis, information about existing and anticipated future conflicts between community development and military operations, proposed strategies to mitigate and/or eliminate identified conflicts, and other preliminary recommendations. The consultant will demonstrate mechanisms for implementation including how cooperatively-developed actions may be incorporated into local General Plan updates, planning documents, and development regulations and policy. Public comments will again be solicited with emphasis on the implementation strategies.

3) Final Recommendations
Prior to the Policy Committee and participating jurisdictions taking any formal actions, the consultant will present the final CUP report, including recommendations and an adoption/implementation Plan and an Economic Impact Study.

Consultant responsibilities related to the public meetings include:

- Schedule appropriate meeting locations, dates and times, in consultation with the City of Monterey and Policy Committee.
- Public notification of meetings to affected citizens, businesses, elected officials and other interested parties.
- Prepare press releases and media kits that highlight purpose and desired outcomes of the public meetings. Coordinate with City of Monterey on press release distribution.
- Arrange for any special accommodations to ensure compliance with the Americans with Disabilities Act and/or non-English speaking participants, as needed.
- Present key study findings, which may include draft reports, maps and other materials, to the public, elected officials, and other interested parties in attendance, and solicit public comments and feedback both during and after the meeting.
- Prepare agendas, handouts, presentations, maps, comment forms and other materials to effectively inform the public about the study and solicit their comments.
- Maintain a record of all public comments received (verbal and written), including a summary or meeting minutes.

Task 4 – Data Collection, Inventory and Mapping
The consultant shall collect all relevant geospatial data from the installation and participating jurisdictions, and other entities or sources in order to conduct the analysis phase of the CUP planning process (e.g., general plans, master plans, and other relevant planning documents and studies). Geospatial data included in the CUP report should, for example, encompass the relevant study area and be in formats compatible with City of Monterey and OEA systems. Specific tasks include:

1. Collection and synthesis of local GIS General Plan land use designations,
2. Collection of Geographic Information System (GIS) zoning designations,
3. Collection and synthesis of Cities and County Sub-Area Plan overlays,
4. Create synthesized GIS layers of legacy lots (non-conforming lots),
5. Create GIS layers of proposed densities by development type and patterns,
6. Collect and create GIS layers of proposed capital improvement and capital facilities plans/projects,
7. Collect, synthesize and create GIS layers of regulated critical areas, other sensitive biological and/or cultural resource areas,
8. Collect, synthesize and create GIS layers of nearshore public access sites,
9. Create GIS layers of special resources areas, i.e. aquifer recharge zones, wetlands, wellhead protection zones, etc.,
10. Create GIS layers of noise contours for military operations,
11. Create GIS layers depicting military operation line of site corridors,
12. Create GIS layers of commercial and non-commercial airport flight paths and noise contours in study area,
13. Create GIS layers of shipping lanes,
14. Create GIS layers of commercial port access and shipping,
15. Create GIS layers depicting both land and sea-based mobility corridors and the regional transportation system,
16. Compile population forecasts from participating jurisdictions,
17. Compile and create GIS layers depicting projected growth trends related to population forecasts,
18. Compile and review local, State and Federal regulatory framework for community development,
19. Compile and review military documents to map footprint for military operations, and any other pertinent documents,
20. Identify policies and regulations that govern off-shore development, such as fisheries harvests, energy production, natural gas storage, oil drilling, or commercial aquaculture ventures,
21. Identify policies and regulations that govern siting of on-shore alternative energy projects, transmission lines, natural gas storage and pipelines, and oil drilling.
22. Create GIS layer of all tribal lands and tribal trust lands.
23. Identify concerns regarding functional, intellectual, and frequency encroachment issues.
24. Compile and review economic data collected for the region (e.g., key economic indicators including but not limited to, demographics, population, social, housing, broadband, tourism, and more installation-related data such as number of federal employees, number of jobs created by federal spending, and other indicators).

In this task, the consultant will also:

- Work cooperatively with the City and project partners throughout CUP technical phases;
- Present collected data and mapping to the Technical Committee, Policy Committee, and public; and,
- Publish findings on project website.

All geospatial data used for compatible use analysis and/or map production will be submitted to OEA in either the ESRI File Geodatabase format (*.gdb) or ESRI Shapefile format (*.shp). Data should be readable within standard Geographic Information Systems (GIS) software (e.g., ESRI’s ArcMap, etc.), and it should be limited to the area around the project’s Area of Interest (AOI) in order to omit unnecessary data. The military service and the community should confirm that all geospatial data is publicly releasable prior to delivery.

Regardless of the geospatial data format, all geospatial data will include metadata in either the ISO 19139 Metadata Implementation Specification style or the Spatial Data Standards for Facilities, Infrastructure, and Environment-Metadata (SDSFIE-M) style. Metadata records for each dataset will include the minimum required information per metadata style written within the organization’s preferred metadata editor software; e.g., ESRI’s ArcCatalog. For reference purposes only, see SDSFIE Online (https://www.sdsfieonline.org/) for more information on geospatial data structures and metadata requirements. All data compiled, developed, and/or produced will be the collective property of the consultant, City, and the DoD agencies.

**Task 5 – Survey/Interview Key Stakeholders (may also be combined with Subtask 3.4 Visioning)**

1. Prepare interview questions in consultation with the City and partners,
2. Interview participating local government staff and elected officials, including tribal leaders,
3. Interview State government staff and elected officials,
4. Interview agency/institution management,
5. Interview military installation representatives, and
6. Compile interview results to define opportunities and constraints.
In this task, the consultant will also:

- Present collected data to the Technical Committee, Policy Committee, and public, and
- Publish findings on project website.

**Task 6 – Conflict/Compatibility Analysis**

General CUP compatibility challenge areas include, but are not limited to:

- Interagency Coordination/Communication
- Land Use
- Regulatory Limitations
- Safety Zones
- Unexploded Ordnance
- Vertical Obstructions
- Local Housing Availability
- Community Infrastructure
- Anti-Terrorism/Force Protection
- Noise
- Vibration
- Dust/Smoke/Steam
- Light and Glare
- Energy Development
- Air Quality
- Frequency Spectrum Impedance/Interference
- Public Trespassing
- Cultural and Historical Resource Sites
- Natural Resources
- Legislative Requirements and Initiatives
- Water Quality/Quantity
- Threatened & Endangered Species/Critical Habitat
- Marine Environments
- Land, Air, and Sea Space and Capacity
- Frequency Spectrum Capacity
- Climate Resilience
- Transportation Capacity (Road and Transit)
- Urban Growth
- Other

In consultation with the City and partners:

1. Identify areas of current land use conflict, type of conflict and impact,
2. Identify functional, intellectual, and frequency encroachment issues,
3. Identify areas of current shoreline use and activities conflict and impact,
4. Identify areas of future potential conflict, type of conflict and impact,
5. Identify areas where land use is compatible, test sustainability, assess risk,
6. Identify both land and sea mobility corridor conflicts, type of conflict and impact, and
7. Identify conflicts relating to potential on- and off-shore development, such as oil and gas production and storage or commercial and tribal fishing ventures.
For each of these items the consultant will receive data and input from the City and partners to:

- Map conflict areas,
- Present data and mapping to the Technical Committee and Policy Committee,
- Work cooperatively with and solicit input from the City, partners, and affected jurisdictions and tribal governments on resolution of conflicts and impacts,
- Present data and mapping to the public to solicit input on resolution of conflicts and impacts, and
- Publish findings on project website.

**Task 7 – Conflict Resolution Strategies**

Working directly with local planning staff from the City of Monterey, City of Seaside, City of Pacific Grove, Monterey County, San Luis Obispo County, Monterey Peninsula Regional Airport, Pebble Beach Community Services District, and other identified jurisdictions:

1. Develop resolution strategies for current conflict areas.
2. Develop resolution strategies and timeline for future conflict areas.
3. Develop resolution strategies to support compatible land uses.
4. Identify model planning tools and techniques to guide compatible development.
6. Develop a process at the local level for cities and counties to work with the State of California, Army, Navy, Department of Defense Siting Clearinghouse, and other Federal agencies to support compatibility between development of regional renewable energy resources and military operations, including test and training activities. The Department of Defense Siting Clearinghouse requirements and standards published in Title 32, Code of Federal Regulations, Part 211 shall advise and guide the process to facilitate the early submission of renewable energy project proposals to the Clearinghouse for military mission compatibility review.
7. Develop recommendations on transportation infrastructure resulting from future military mission needs and relate to transportation requirements for future development. Ensure these recommendations are coordinated with appropriate local and/or State transportation organizations responsible for transportation planning and funding.
8. Develop a tool box of policies, regulations, ordinances, agreements, etc. to address existing incompatibility issues and guide future compatible development to protect and preserve military readiness and defense capabilities while supporting continued community economic development.
9. City/Agency/Institution review of potential solutions.
10. Present potential solutions to Policy Committee for review and comment.
11. Solicit public input to potential solutions.

**Task 8 – Prepare Study Report**

**Subtask 8.1 Draft Plan**

1. Compile resolution strategies.
2. Develop short-, mid-, and long-term priorities.
3. In cooperation with City of Monterey and project partners, develop an appropriate implementation strategy for CUP recommendations. The strategy is anticipated to recommend actions for federal, state, local, non-governmental agencies. The consultant will identify appropriate responsible parties, timelines, estimated costs, and appropriate financing mechanisms to implement the recommendations.
4. Develop a monitoring plan and recommend an organizational structure and process that promotes CUP participants to continue working together on compatibility and viability issues beyond completion of the CUP.
5. Develop metrics for measuring plan effectiveness.
7. Compile responses to Draft Plan and update as required.
Subtask 8.2 Final Plan

1. Present Final CUP to Policy Committee for final approval.
2. Present Final CUP to participating local jurisdiction legislative bodies for recommendation.
3. Deliver completed CUP document to City of Monterey.

The consultant will provide copies of printed final report in sufficient quantities to City of Monterey for distribution to the study participants, as well as an electronic copy of the final report for future reproduction and distribution, as needed.

Subtask 8.3 Project Overview

The CUP project deliverable shall include a brief Project Overview to post on the OEA website. Project Overview shall include description of military operations, graphic display of study area and military operations footprint, identify community organization structure and participants for both planning and implementation, summary of compatible use issues, and primary CUP recommendation highlights.

A disclaimer statement will appear on the title page of the Compatible Use Plan, or any other OEA-funded deliverable. It will read:

“This study was prepared under contract with City of Monterey, California, with financial support from the Office of Economic Adjustment, Department of Defense. The content reflects the views of City of Monterey and does not necessarily reflect the views of the Office of Economic Adjustment or Department of Defense.”

IV. PROPOSAL REQUIREMENTS

A. All proposals shall include the following minimum information:

1. Management and Team Members. Provide a description of the team/consultant organization, and a work plan that identifies the personnel to be assigned to each task. The organization description should clearly identify who will be the project manager and the day-to-day contact person for the job. Include relevant experience of the team members who will be assigned to the project.
2. A list of subconsultants to be used, if any, and their expertise as called for in Item 1, above.
3. Scope of Work. A description of methodology, techniques, and procedures for each of the scope of work items with an explanation of how the proposer plans to approach the tasks and the steps that will be taken to complete the task including analytical methods and tools. Proposers must demonstrate that they understand the magnitude and importance of each individual task, the unique issues relevant to the missions of each installation and support facility, and examples of a unique approach to addressing the issues. Respondents may propose modifications to the tasks and sequencing reflected above which, based on previous experience, would improve the effectiveness of the CUP study effort while maintaining the budget and timeframe.
4. Schedule. Provide the overall timeline and milestones necessary to complete the study within 14 months.
5. Organization Qualifications. Provide an outline of the organization qualifications indicating relevant background experience and capabilities for this work. A list of major projects, both ongoing and planned, to which the organization is committed during the time frame of this contract should also be provided. Include the staff resources devoted to those projects and the status of the projects.
6. References. Provide at least three client references with phone numbers for relevant work. Specify the client, location, consultant firm members and participating individuals and their roles on team (principal, project director, etc.), type of work, implementation results or status, examples of work, and other relevant information as needed.
B. Fee Schedule/Cost of Proposal

The proposer shall prepare a detailed cost proposal for the work to be performed. Indicate the hourly rate for each category of employee (i.e., Principal, Technician, etc.) and fees for applicable direct costs (blueprint, reproduction, etc.). No “mark-up” will be allowed for direct costs. If applicable, per diem shall be billed at a maximum of the GSA rate and mileage shall be billed at the IRS mileage rate in place at the time of billing. No “mark-up” will be allowed for per diem or mileage. Sub-consultant services are to be billed at cost plus ten percent (10%) maximum.

V. SUBMISSION OF PROPOSALS

Please submit four sealed copies, plus one electronic copy, of the proposal clearly marked with the project name on the outside of the envelope. Proposals must be submitted no later than 4:00 p.m., February 26, 2020. Proposals will not be accepted after this time.

Proposals should be submitted to:
Kimberly Cole, Community Development Director
Community Development Department
580 Pacific Street
Monterey, CA 93940

PROCEDURES AND EVALUATION OF PROPOSALS

A. Evaluation Criteria. An evaluation committee of City staff personnel will review and evaluate all proposals received by the due date based on the following criteria:

1. Ability to Design an Approach and Work Plan to Meet the Project Requirements. An assessment of the overall quality of the proposal. Qualities and indicators that will receive consideration include the detail and clarity of the discussion as to the proposer’s approach to undertaking the project; the proposer’s performance in identifying specific compatibility issues which may be associated with one or more of the study areas and preliminary ideas about how these issues should be addressed; the inclusion of any unique approaches which are designed to increase the benefits or effectiveness of the proposed work; the demonstrated ability to work with governmental and military bodies and diverse community interests; and a full understanding of applicable laws or regulations that relate to the project.

2. Ability of the Proposer to Carry Out and Manage the Proposed Project. An assessment of the past experience of the organization in general. Qualities and indicators that will receive consideration include the number and types of projects the organization or its employees have completed; the variety of projects completed and a demonstration of the organization’s ability to undertake this project; the general level of experience in the areas of supervision, observing and monitoring projects; the organization’s ability to realize timetables and quality control objectives; and the demonstrated general ability to bring about a successful completion of the projects under the proposer’s direction.

3. Unique Experience and Qualifications in Comprehensive Land Use Planning with particular emphasis on local government and military base planning and previous experience with CUPs (e.g., JLUS); relevant background of assigned members of the consulting team, again with emphasis on previous experience with CUPs; and demonstrated knowledge and experience in community planning, development and land use issues, fiscal impact analysis, economic development, environmental permitting, regional air quality attainment, natural resources, infrastructure, noise management, communication and coordination collaboration, and military installation management and operations.
4. **Staff:** An assessment of the perceived ability of each organization to devote the necessary human resources and management attention to the project. Do the qualifications of key personnel to be assigned to the project coincide with project’s requirements? Do assigned personnel and subconsultant personnel have requisite education, experience, and professional qualifications and licenses?

5. **Familiarity with Locality:** Does the firm have familiarity with the Cities and Counties required to successfully complete the project? How close are the firm’s permanent offices to the Monterey Peninsula?

6. **Willingness to Comply with the Proposed Agreement Terms.** A sample agreement is attached as Appendix A. Proposals will be rated based on any exceptions taken to the proposed agreement.

7. **Reputation:** Are the firm’s references from past clients and associates favorable; and, does the firm show financial and operational stability?

8. **Cost of Proposal:** Cost, while not determinative, may be considered in the selection process.

**B. Procedures**

1. At the completion of the review process, proposers will be ranked based on the Evaluation Criteria described in section A above. The City will select the highest ranked firm or, at City’s option, the most highly qualified firms will form a “shortlist.”

2. Should the City elect to establish a “short list,” firms on the short list may be asked to formally present their proposal in Monterey and respond to interviewer questions. The interview panel will be the evaluation committee. The presentation and interview session will not exceed one hour per proposer. Following presentations/interviews, the evaluation committee will complete its ranking.

3. Upon completion of the rankings, fee negotiations will commence with the highest ranked firm. If the fees are mutually agreed upon after negotiations, an agreement will be placed on a City Council agenda for approval consideration. If fee negotiations are unsuccessful with the highest ranked firm, that firm will be excused and the fee schedule of the next highest ranked firm will be negotiated.

**VI. GENERAL CONDITIONS**

The City of Monterey reserves the right to enter into agreements with multiple firms as a result of this solicitation. Further, the City makes no representations that any agreement will be awarded to any organization submitting a proposal. The City reserves the right to reject any and all proposals submitted in response to this request or any addenda thereto and may, in its discretion, reissue its Request for Proposals.

The City also reserves the right to reject any sub-consultant or individual working on a consultant team and to replace the sub-consultant or individual with a mutually acceptable replacement.

**PROCUREMENT STANDARDS**

This solicitation and contract will follow the General Procurement Standards as defined in 2 CFR 200 and in the following link:

https://www.ecfr.gov/cgi-bin/retrieveECFR?gp=&SID=a418423128d6c8865b710d97434eebc0&mc=true&n=sp2.1.200.d&r=SUBPART&ty=HTML#sg2.1.200_1316.sg3
CONTRACT TYPE AND PROCUREMENT METHOD

The type of contract will be fixed price with procurement by competitive proposal as defined in 2 CFR 200 §200.320(d).

VII. LIABILITY OF COSTS AND RESPONSIBILITY.

The City shall not be liable for any costs incurred in response to this Request for Proposals. All costs shall be borne by the person or organization responding to the request. The person or organization responding to the request shall hold the City harmless from any and all liability, claim or expense whatsoever incurred by or on behalf of that person or organization. All submitted material becomes the property of the City of Monterey.

The selected lead consultant will be required to assume responsibility for all services offered in the proposal whether or not they possess them within their organization. The selected lead consultant will be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

VIII. PUBLIC NATURE OF PROPOSAL MATERIAL.

Responses to this Request for Proposals become the exclusive property of the City of Monterey. At such time, as a formal recommendation to award an agreement to one proposer is made to the awarding authority, all submittals received in response to this Request for Proposal become a matter of public record and shall be regarded as public records, with the exception of those elements in each submittal which are business or trade secrets and plainly marked as “Confidential,” “Trade Secret,” or “Proprietary” or if disclosure is not required under the California Public Records Act. Any submittal which contains language purporting to render all or significant portions of the proposal “Confidential,” “Trade Secret,” or “Proprietary,” shall be regarded as non-responsive.

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the City may not be in a position to establish that the information that a proposer submits is a trade secret. If a request is made for information marked “Confidential,” “Trade Secret,” or “Proprietary,” the City will provide the proposer who submitted the information with reasonable notice to allow the proposer to seek protection from disclosure by a court of competent jurisdiction.

IX. VALIDITY.

The proposer agrees to be bound by its proposal for a period of ninety (90) days commencing from the date proposals are due, during which time the City may request clarification or correction of the proposal for the purpose of evaluation. Amendments or clarifications shall not affect the remainder of the proposal, but only the portion so amended or clarified.

X. STANDARD AGREEMENT.

A sample agreement has been provided as Appendix A for the proposer’s review and comment. If a proposer wishes to take exception to any of the terms and conditions contained in the consultant agreement, these should be identified specifically; otherwise, it will be assumed that the proposer is willing to enter into the agreement as it is written.

Failure to identify contractual issues of dispute can later be the basis for the City disqualifying a proposer. Any exceptions to terms, conditions, or other requirements must be clearly stated. Otherwise, the City will consider that all items offered are in strict compliance with the RFP, and the successful proposer will be responsible for compliance. The City will consider such exceptions as part of the evaluation process, which may constitute grounds for rejection of the proposal. The agreement will not be executed by the City without first being signed by the proposer.
XI. PERMITS AND LICENSES.

Proposer, and all of proposer's sub consultants, at its and/or their sole expense, shall obtain and maintain during the term of any agreement, all appropriate permits, certificates and licenses including, but not limited to, a City Business License, which will be required in connection with the performance of services hereunder.

XII. ORAL AND WRITTEN EXPLANATIONS.

Written responses to question(s) asked by one proposer will be provided to all proposers who received this Request for Proposal. All questions or requests for interpretations must be submitted ninety-six (96) hours before the proposal submission deadline. If found necessary, interpretation or correction will be made by written addendum, a copy of which will be sent to each proposer who received this Request for Proposal. Such addenda are to be considered as part of this Request for Proposal and shall be binding on all proposers.

The City will not be bound by oral explanations or instructions given at any time during the review process or after the award. Oral explanations given during the review process and after award become binding only when confirmed in writing by an authorized City official.

XIII. PROPOSER'S REPRESENTATIVE.

The person signing the proposal must be a legal representative of the firm authorized to bind the firm to an agreement in the event of the award.

XIV. INSURANCE.

General liability, automobile, professional liability, and worker's compensation insurance are required in the amount set forth in Appendix B “Summary of Indemnity and Insurance Requirements”. Proposers should consider the costs of carrying the insurance required.

Appendices:

A. Standard Contract
B. Summary of Indemnity and Insurance Requirements
APPENDIX A:

CITY STANDARD AGREEMENT

CONTRACT FOR PROFESSIONAL SERVICES

[Name of the Contract] Agreement

THIS AGREEMENT is executed this ___ day of __________, 201_, by and between the City of Monterey, a municipal corporation, (hereinafter "City") and [Name of Consultant] (hereinafter called "Consultant").

IT IS HEREBY MUTUALLY AGREED AS FOLLOWS:

1. **Scope.** Consultant hereby agrees to provide to the City of Monterey, as the scope of services under this Agreement, the following services: [General description of the scope of work], as further described on the following attachments: City’s Request for Proposal which outlines the scope of services and work under this contract (attached hereto as Exhibit “A”), and the approved Consultant’s Proposal dated [insert date] (attached hereto as Exhibit “B”). In case of any conflicting terms it is the express intent of the parties hereto that the order of precedence and controlling language shall be as follows: No. 1 this Agreement; No. 2 City’s Request for Proposal (Exhibit “A”); No. 3 Consultant’s proposal (Exhibit “B”) [add additional items if applicable, No. 4 – X, insert Exhibits in the order controlling terms should apply.].

2. **Timely Work.** Consultant shall perform all tasks in a timely fashion, as set forth more specifically in paragraph 3 below. Failure to so perform is hereby deemed a material breach of this Agreement, and City may terminate this Agreement with no further liability hereunder.

3. **Term.** The work under this Agreement shall commence upon execution and shall be completed one year thereafter, unless City grants a written extension of time as forth in paragraph 2 above. This Agreement may be extended for two additional one-year terms by mutual written agreement of the parties.

4. **Compensation.** City agrees to pay and Consultant agrees to accept as full and fair consideration for the performance of this Agreement, an hourly fee as set forth in Consultant’s Proposal (Exhibit B), in a total amount not to exceed amount of Five Hundred Thousand Dollars ($500,000.00) per year, for a total not to exceed amount of One Million Five Hundred Thousand Dollars ($1,500,000.00) over the maximum three year contract period.. Compensation under this Agreement shall become due and payable 30 days after City’s approval of Consultant’s submission of monthly written invoices to Elizabeth Caraker, AICP, Housing and Community Development Manager. Written invoices shall clearly show the account numbers for each project and shall include a copy of timesheets or invoices from sub-consultants. The payment of any compensation to Consultant hereunder shall be contingent upon performance of the terms and conditions of this Agreement to the satisfaction of the City. If City determines that the work set forth in the written invoice has not been performed in accordance with the terms of this Agreement, City shall not be responsible for payment until such time as the work has been satisfactorily performed.

5. **Additional Services.** In the event that City should request additional services not covered by the terms of this Agreement, said services will be provided by Consultant and paid for by City only after a fee for said services has been agreed upon between Consultant and City project manager and the project manager provides written authorization for the additional work.

6. **Schedule for Performing Services.** For the project subject to this Agreement, Consultant shall perform the services in accordance with the following phases and/or milestone dates:
7. **Staffing Plan.** Consultant shall provide City with the names of the key professional personnel assigned to perform the services under this Agreement as well as a general description of the services they will be assigned to perform in Exhibit "D" Consultant’s Staffing Plan. The plan shall also identify the names and contact information of Consultant’s representative(s) authorized to act on their behalf with respect to this Agreement.

8. **Subconsultant Plan.** If Consultant intends to utilize the services of any subconsultants to perform the services under this Agreement, the names of those subconsultants and a general description of the services they will be assigned to perform shall be attached hereto as Exhibit “E” Subconsultant Plan.

9. **Meet and Confer.** Consultant agrees to meet and confer with City or its agents or employees with regard to services as set forth herein as may be required by City to insure timely and adequate performance of this Agreement.

10. **Indemnification.** Consultant hereby agrees to the following indemnification clause:

To the fullest extent permitted by law (including, without limitation, California Civil Code Sections 2782 and 2782.6), Consultant shall defend (with legal counsel reasonably acceptable to the City of Monterey), indemnify and hold harmless the City of Monterey and its officers, designated agents, departments, officials, representatives and employees (collectively "Indemnitees") from and against claims, loss, cost, damage, injury expense and liability (including incidental and consequential damages, court costs, reasonable attorneys' fees, litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) to the extent they arise out of, pertain to, or relate to, the negligence, recklessness, or willful misconduct of Consultant, any Subconsultant, anyone directly or indirectly employed by them, or anyone that they control (collectively "Liabilities"). Such obligations to defend, hold harmless and indemnify any Indemnitee shall not apply to the extent that such Liabilities are caused in part by the negligence, or willful misconduct of such Indemnitee.

Notwithstanding the provisions of the above paragraph, Consultant agrees to indemnify and hold harmless the City from and against any and all claims, demands, defense costs, liability, expense, or damages arising out of or in connection with damage to or loss of any property belonging to Consultant or Consultant’s employees, contractors, representatives, patrons, guests or invitees.

Consultant further agrees to indemnify City for damage to or loss of City of Monterey property to the proportionate extent they arise out of Consultant's negligent performance of the work associated with this agreement or to the proportionate extent they arise out of any negligent act or omission of Consultant or any of Consultant's employees, agents, contractors, representatives, patrons, guests or invitees; excepting such damage or loss arising out of the negligence of the City.

1. **Insurance.** Consultant shall submit and maintain in full force all insurance as described herein. Without altering or limiting Consultant’s duty to indemnify, Consultant shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:

   **Commercial general liability insurance** including but not limited to premises, personal injuries, bodily injuries, products, and completed operations, with a combined single limit of not less than $1,000,000 per occurrence and $2,000,000 in the aggregate.

   **Professional Liability Insurance.** Consultant shall maintain in effect throughout the term of this Agreement professional liability insurance with limits of not less than $1,000,000 per claim and $2,000,000 in the aggregate. Consultant will either maintain or cause to be maintained professional liability coverage in full force or obtain extended reporting (tail) coverage (with the same liability limits) for at least three years following City's acceptance of the work.

   **Commercial automobile liability insurance** covering all automobiles, including owned, leased, non-owned, and hired automobiles, used in providing services under this Agreement, with a combined single limit of not less than $1,000,000 per occurrence.
Workers' Compensation Insurance. If Consultant employs others in the performance of this Agreement, Consultant shall maintain workers' compensation insurance in accordance with California Labor Code section 3700 and with a minimum of $1,000,000 per occurrence for employer's liability.

Other Insurance Requirements

A. All insurance required under this Agreement must be written by an insurance company either:

- admitted to do business in California with a current A.M. Best rating of no less than A:VI; or

- with a current A.M. Best rating of no less than A: VII.

Exception may be made for the State Compensation Insurance Fund when not specifically rated.

B. Each insurance policy required by this agreement shall be endorsed to state that City of Monterey shall be given notice in writing at least thirty days in advance of any cancellation thereof, except 10-day notice for nonpayment of the premium.

C. The general liability and auto policies shall:

- Provide an endorsement naming the City of Monterey, its officers, officials, and employees as additional insureds under an ISO CG 20 10 07 04 or ISO 20 37 07 04 or their equivalent.

- Provide that such insurance is primary and non-contributing insurance to any insurance or self-insurance maintained by the City.

- Contain a "Separation of Insureds" provision substantially equivalent to that used in the ISO form CG 00 01 10 01 or their equivalent.

- Provide for a waiver of any subrogation rights against the City via an ISO CG 24 01 10 93 or its equivalent.

D. Prior to the start of work under this Agreement, Consultant shall file certificates of insurance and endorsements evidencing the coverage required by this agreement with the City of Monterey Risk Management Office. Consultant shall file a new or amended certificate of insurance promptly after any change is made in any insurance policy which would alter the information on the certificate then on file.

E. Neither the insurance requirements hereunder, nor acceptance or approval of Consultant's insurance, nor whether any claims are covered under any insurance, shall in any way modify or change Consultant's obligations under the indemnification clause in this Agreement, which shall continue in full force and effect. Notwithstanding the insurance requirements contained herein, Consultant is financially liable for its indemnity obligations under this Agreement.

F. Any deductibles or self-insured retentions must be declared to and approved by the City of Monterey. At the option of the City of Monterey, either: the insured shall reduce or eliminate such deductibles or self-insured retentions as respects the City of Monterey, its officers, officials, employees and volunteers; or Consultant shall provide a financial guarantee satisfactory to the City of Monterey guaranteeing payment of losses and related investigations, claim administration, and defense expenses.
2. **Ownership of Work and Copyrights.** Upon completion of the work under this Agreement, ownership, title and copyrights to all materials and deliverables produced as part of this Agreement will automatically be vested in the City and no further agreement will be necessary to transfer ownership to City.

3. **Licensing – Standard of Care.** Consultant represents as follows: that it is experienced in the professional services and a specialist in the work performed under this Agreement; is duly organized, existing and in good standing under applicable state law; and is properly licensed and/or certified to perform the work specified under this Agreement, including but not limited to possession of a current City business license, and will only employ persons and subconsultants with all required licenses and certifications.

4. **Substitution of Consultant Personnel.** The key personnel of Consultant or any subconsultants listed in Consultant’s proposal or in Consultant’s Staffing Plan and Subconsultant Plan (Exhibits D and E hereto) and assigned to perform the work under this Agreement may not be substituted with or replaced by other personnel or subconsultants without the advance written consent of City. If, at any time, the City reasonably objects to the performance, experience, qualifications or suitability of any of Consultant’s employees or subconsultants, then Consultant shall, on written request from the City, replace such employee or subconsultant. Consultant shall replace the individual with a qualified individual acceptable to the City.

5. **Non-Discrimination.** No discrimination shall be made by Consultant or any subconsultant in the hiring and employment of persons for the work under this Agreement or any other City project because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status of any person. Every person in violation of this section is subject to the penalties in accordance with the provisions of Section 1735 of the Labor Code.

6. **Termination.** City may terminate this Agreement upon fifteen days’ written notice. The amount of damages, if any, as a result of such termination may be decided by negotiations between the parties or before a court of competent jurisdiction.

7. **Agency.** In performing the services specified under this Agreement, Consultant is hereby deemed to be an independent Consultant and not an agent or employee of City.

8. **Entire Agreement.** This Agreement constitutes the entire Agreement between the parties hereto and supersedes any and all prior agreements, whether oral or written, relating to the subject matter thereof. Any modification of this Agreement will be effective only if it is in writing signed by both parties hereto.

9. **Validity.** If any provision in this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will continue in full force without being impaired or invalidated in any way.

10. **Assignment of Interest.** The duties under this Agreement shall not be assignable, delegable, or transferable without the prior written consent of City. Any such purported assignment, delegation, or transfer shall constitute a material breach of this Agreement upon which City may terminate this Agreement and be entitled to damages.

11. **Conflict of Interest.** Consultant hereby certifies that it does not now have, nor shall it acquire, any financial or business interest that would conflict with the performance of services under this Agreement.

12. **Counterparts.** This Agreement may be executed in multiple originals, each of which is deemed to be an original, and may be signed in counterparts.

13. **Laws.** Consultant agrees that in the performance of this Agreement it will reasonably comply with all applicable State, Federal and local laws and regulations. This Agreement shall be governed by and construed in accordance with the laws of the State of California and the City of Monterey.
IN WITNESS WHEREOF, this Agreement is entered into by the parties hereto on the day and year first above written in Monterey, California.

CITY OF MONTEREY

__________________________   __________________________
City Manager      Authorized Signature

__________________________
Print Name & Title

[CONSULTANT NAME]
APPENDIX B:

SUMMARY OF INDEMNITY AND INSURANCE REQUIREMENTS
For Non-Design Professionals

Please provide a copy of these indemnity and insurance requirements to your insurance broker or insurer to confirm compliance.

INDEMNIFICATION AND HOLD HARMLESS

To the fullest extent permitted by law, Contractor agrees to indemnify, investigate, defend (at Contractor's sole cost and expense and with legal counsel reasonably approved by City), protect and hold harmless, the City of Monterey, its officials, officers, employees, agents, and representatives from and against any and all claims [including, without limitation, claims for bodily injury or death (including but not limited to Contractor, persons employed by Contractor, persons acting on behalf of Contractor, and third parties) or damage to property], demands, obligations, losses, damages, actions, causes of action, suits, judgments, fines, penalties, liabilities, defense costs, and expenses (including, without limitation, reasonable attorneys' fees, disbursements, and court costs, and all other professional, expert, or Contractors' fees and costs) of every kind or nature arising out of or in connection with or relating to any work or activities of Contractor (or Contractor's contractors or subcontractors, if any) conducted under this Agreement or arising out of the failure on Contractor's part to perform their obligations under this agreement. Except as provided by law, the indemnification provisions stated above shall apply regardless of the existence or degree of fault of the City, except for those claims which arise out of the active negligence, sole negligence, or willful misconduct of the City of Monterey. Notwithstanding the provisions of the above paragraph, Contractor agrees to assume all risk and to indemnify and hold harmless the City from and against any and all claims, demands, defense costs, liability, expense, or damages of any kind or nature arising out of or in connection with damage to or loss of any property belonging to Contractor or Contractor's employees, contractors, representatives, patrons, guests, or invitees.

Contractor further agrees to indemnify City for damage to or loss of City property arising out of or in connection with Contractor's work associated with this Agreement or arising out of any act or omission of Contractor or any of Contractor's employees, agents, contractors, representatives, patrons, guests, or invitees; excepting such damage or loss arising out of the negligence of the City.

INSURANCE

Without altering or limiting Contractor's duty to indemnify, Contractor shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:

1. **Contractor's Commercial General Liability Insurance** including but not limited to personal injuries, bodily injuries, premises/operations, completed operations/products, contractual liability, independent contractors (if any part of the work is to be subcontracted), broad form property damage and cross-liability coverage with a combined single limit of not less than $1,000,000 per occurrence and $2,000,000 in the aggregate.

2. **Commercial Automobile Liability Insurance** covering all automobiles, including owned, leased, non-owned, and hired automobiles, used in providing services under this Agreement, with a combined single limit of not less than $1,000,000.

3. **Workers' Compensation Insurance.** If Contractor employs others in the performance of this Agreement, Contractor shall maintain workers' compensation insurance in accordance with California Labor Code section 3700 and with a minimum of $100,000 per occurrence for employer's liability. Workers' compensation policy shall be endorsed with a waiver of subrogation in favor of the City for all work performed by the Contractor, its employees, agents, and subcontractors.
OTHER INSURANCE REQUIREMENTS

1. All insurance required under this Agreement must be written by an insurance company either:
   • Admitted to do business in California with a current A.M. Best rating of no less than A:VI; or
   • An insurance company with a current A.M. Best rating of no less than A:VII.

Exception may be made for the State Compensation Insurance Fund when not specifically rated.

2. Each insurance policy required by this Agreement shall be endorsed to state that City of Monterey shall be given notice in writing at least thirty days in advance of any change, cancellation, or non-renewal thereof.

3. The general liability and auto policies shall:
   • Provide an endorsement naming the City of Monterey, its officers, officials, and employees as additional insureds under an ISO CG 20 10 11 85 or equivalent.
   • Provide that such insurance is primary and non-contributing insurance to any insurance or self-insurance maintained by the City.
   • Contain a “Separation of Insureds” provision substantially equivalent to that used in the ISO form CG 00 01 10 01.
   • Provide a waiver of any subrogation rights against the City.

4. Prior to the start of work under this Agreement, Contractor shall file certificates of insurance and endorsements evidencing the coverage required by this agreement with the City department contact and such must be acceptable to the City Risk Management Office. Contractor shall file a new or amended certificate of insurance and requisite endorsements promptly after any change is made in any insurance policy which would alter the information on the certificate and/or endorsements then on file.

5. Neither the insurance requirements hereunder, nor acceptance or approval of Contractor’s insurance, nor whether any claims are covered under any insurance, shall in any way modify or change Contractor’s obligations under the indemnification clause in this Agreement, which shall continue in full force and effect. Notwithstanding the insurance requirements contained herein, Contractor is financially liable for its indemnification obligations under this Agreement.

6. Any deductibles or self-insured retentions must be declared to and approved by the City. At the option of the City, either: the insured shall reduce or eliminate such deductibles or self-insured retentions as respects the City, its officers, officials, employees, and volunteers; or Contractor shall provide a financial guarantee satisfactory to the City guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

7. For any claims related to this project, the Contractor’s insurance coverage shall be primary insurance as respects the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City shall be excess of the Contractor’s insurance and shall not contribute with it.

Contractor shall either (1) require each of its subcontractors to procure and to maintain during the life of its subcontract, Commercial General Liability Insurance, Automobile or Vehicle Liability Insurance and Workers’ Compensation Insurance of the type and in the amounts specified above, or; (2) insure the activities of its subcontractors in its policies. Prior to commencement of any work by any subcontractor, Contractor shall file certificates of insurance and endorsements evidencing the coverage required by this paragraph with the City department contact and such evidence of insurance must be acceptable to the City Risk Management Office. Contractor shall file a new or amended certificate of insurance promptly after any change is made in any insurance policy which would alter the information on the certificate and/or endorsements then on file.
Figure 1: Map of Installations

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts
Figure 2: Citywide Map of Installations

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts
Figure 3: Presidio of Monterey Sphere of Influence

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts
Figure 4: Naval Support Activity Monterey Sphere of Influence

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts
Figure 5: Fleet Numerical Meteorology and Oceanography Center and Naval Research Laboratory Sphere of Influence

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts
Figure 6: Defense Manpower Data Center Sphere of Influence

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts

Source: City of Monterey, Monterey County GIS, ESRI, USGS
Figure 7: Fort Hunter Liggett Sphere of Influence

Source: City of Monterey, Monterey County GIS, ESRI, USGS.
Figure 8: Camp Roberts Sphere of Influence

Joint Land Use Study of Presidio of Monterey, Naval Support Activity Monterey, Fort Hunter Liggett, Camp Roberts