



COUNTY OF SANTA BARBARA

Planning and Development

# ***MAINTENANCE OF SPECIALTY CONSULTANT LIST***

Board of Supervisors

May 23, 2006



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## **WHY DO THIS?**

- *To Update the Process for Qualifying, Maintaining and Using Specialist Consultants*



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### **BACKGROUND**

- Planning & Development maintains a list of specialty consultants who are qualified by issue area
- Previous procedures adopted in 2002
- Nine Issue Areas
  - *Arborists, Archaeologists, Biologists, Architectural Historians, Native American Consultants, Noise Consultants, Paleontologists, Telecommunications Consultants, Traffic Consultants*



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## PROCEDURE UPDATES

### ■ *Includes:*

- Procedural Steps for Qualifying a Consultant
- Contract Management Options
- Provisions for Regular Updates
- Conflict of Interest Clause and Status as a Qualified Consultant
- Provisions for Removal From Qualified List



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## **STEPS FOR QUALIFYING CONSULTANT**

1. Interested consultant submits qualifying materials to department
2. Reviews conducted once a year by staff based on established criteria for each issue area
3. Assigned reviewer makes recommendation to Assistant Director who will make final decision
4. Consultant is notified by mail regarding placement



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## **REGULAR UPDATES**

- Annual Self-Certification by Consultants
- Re-submittal of Qualifications Every Three Years by Consultants
  - Promotes accurate record-keeping
  - Ensures applicants receive updated list of qualified firms



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## **STATUS AS QUALIFIED CONSULTANT**

- Does not require P&D to direct any work toward the consultant
- Consultant may not work on projects where he/she has a clear conflict of interest
- Qualified consultants are not employees of the County or the Department
- Qualified consultants may not use status for marketing or general communication purposes without prior consent





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## **REMOVAL FROM COUNTY LIST**

***Consultants will be removed from list for:***

- Failure to respond to requests for annual self-certifications or updated qualifications
- Failure to follow County guidelines
- Failure to disclose conflict of interest
- Misrepresentation of facts
- Omission of relevant information
- Use of status for marketing or general communication purposes without prior consent





## **CONTRACT MANAGEMENT**

1. *Applicant Directed Contract with Consultant NOT on County's List*
  - Applicant manages contract with a consultant not on County's list
  - Work produced under this option will be peer reviewed by a Consultant from the County's List
2. *Applicant Directed Contract with County Approved Consultant*
  - Applicant hires consultant from County List and manages contract
  - Work will not require peer review unless internal specialist exists or disagreement among experts in CEQA process
3. *P&D Managed Contract*
  - Applicant hires consultant from County List and funds the work directly through P&D
  - P&D manages contract and peer review not required



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## **RECOMMENDATION:**

- *That the Board of Supervisors receive and file this report*