

**AGREEMENT FOR CONSULTANT SERVICES BETWEEN
CITY OF TEMECULA AND SAGECREST PLANNING AND ENVIRONMENTAL
GENERAL PLAN UPDATE MANAGING CONSULTANT (LR24-0462)**

THIS AGREEMENT is made and effective as of **January 28, 2025**, between the **City of Temecula**, a municipal corporation (hereinafter referred to as "City"), and Sagecrest Planning and Environmental a **corporation** (hereinafter referred to as "Consultant"). In consideration of the mutual covenants and conditions set forth herein, the parties agree as follows:

1. TERM

This Agreement shall commence on **January 28, 2025** and shall remain and continue in effect until tasks described herein are completed, but in no event later than **June 30, 2027**, unless sooner terminated pursuant to the provisions of this Agreement.

The City may, upon mutual agreement, extend the contract for one (1) additional one (1) year term. In no event shall the contract be extended beyond June 30, 2028.

2. SERVICES

Consultant shall perform the services and tasks described and set forth in Exhibit A, attached hereto and incorporated herein as though set forth in full. Consultant shall complete the tasks according to the schedule of performance which is also set forth in Exhibit A.

3. PERFORMANCE

Consultant shall faithfully and competently exercise the ordinary skill and competence of members of their profession. Consultant shall employ all generally accepted standards and practices utilized by persons engaged in providing similar services as are required of Consultant hereunder in meeting its obligations under this Agreement.

4. PAYMENT

a. The City agrees to pay Consultant monthly, in accordance with the payment rates and terms and the schedule of payment as set forth in Exhibit B, Payment Rates and Schedule, attached hereto and incorporated herein by this reference as though set forth in full, based upon actual time spent on the above tasks. Any terms in Exhibit B, other than the payment rates and schedule of payment, are null and void. This amount shall not exceed **four hundred ninety five thousand two hundred eighty dollars and zero cents (\$495,280.00), plus 10% Contingency of forty nine thousand five hundred and twenty-eight dollars and zero cents (\$49,258.00)**, for the total term of this agreement .

b. Consultant shall not be compensated for any services rendered in connection with its performance of this Agreement which are in addition to those set forth herein, unless such additional services are authorized in advance and in writing by the City Manager . Consultant shall be compensated for any additional services in the amounts and in the manner as agreed to by City Manager and Consultant at the time City's written authorization is given to Consultant for the performance of said services.

c. Consultant will submit invoices monthly for actual services performed. Invoices shall be submitted between the first and fifteenth business day of each month, for services provided in the previous month. Payment shall be made within thirty (30) days of receipt of each invoice as to all non-disputed fees. If the City disputes any of Consultant's fees, it shall give written notice to Consultant within thirty (30) days of receipt of an invoice of any disputed fees set forth on the invoice. For all reimbursements authorized by this Agreement, Consultant shall provide receipts on all reimbursable expenses in excess of Fifty Dollars (\$50) in such form as approved by the Director of Finance.

5. REGISTRATION WITH THE DEPARTMENT OF INDUSTRIAL RELATIONS

Registration with the Department of Industrial Relations (DIR) is mandatory as a condition for bidding, providing certain services, and working on a public works project as specified in Labor Code Section 1771.1(a). Consultant and any subcontractors must be registered with the Department of Industrial Relations to be qualified to bid, or provide a proposal and/or time and material quote or be listed in a bid, proposal or quote, subject to the requirements of Public Contract Code Section 4104; or engage in the performance of any contract that is subject to Labor Code Section 1720 et seq., unless currently registered and qualified to perform public work pursuant to Labor Code Section 1725.5. Consultant and subcontractors will be required to provide proof of registration with the DIR. For more information regarding registration with the Department of Industrial Relations, refer to <http://www.dir.ca.gov/Public-Works/PublicWorks.html>

6. SUSPENSION OR TERMINATION OF AGREEMENT WITHOUT CAUSE

a. The City may at any time, for any reason, with or without cause, suspend or terminate this Agreement, or any portion hereof, by serving upon the Consultant at least ten (10) days prior written notice. Upon receipt of said notice, the Consultant shall immediately cease all work under this Agreement, unless the notice provides otherwise. If the City suspends or terminates a portion of this Agreement such suspension or termination shall not make void or invalidate the remainder of this Agreement.

b. In the event this Agreement is terminated pursuant to this Section, the City shall pay to Consultant the actual value of the work performed up to the time of termination, provided that the work performed is of value to the City. Upon termination of the Agreement pursuant to this Section, the Consultant will submit an invoice to the City, pursuant to Section entitled "PAYMENT" herein.

7. DEFAULT OF CONSULTANT

a. The Consultant's failure to comply with the provisions of this Agreement shall constitute a default. In the event that Consultant is in default for cause under the terms of this Agreement, City shall have no obligation or duty to continue compensating Consultant for any work performed after the date of default and can terminate this Agreement immediately by written notice to the Consultant. If such failure by the Consultant to make progress in the performance of work hereunder arises out of causes beyond the Consultant's control, and without fault or negligence of the Consultant, it shall not be considered a default.

b. If the City Manager or his delegate determines that the Consultant is in default in the performance of any of the terms or conditions of this Agreement, it shall serve the Consultant with written notice of the default. The Consultant shall have ten (10) days after service upon it of said notice in which to cure the default by rendering a satisfactory performance. In the

event that the Consultant fails to cure its default within such period of time, the City shall have the right, notwithstanding any other provision of this Agreement, to terminate this Agreement without further notice and without prejudice to any other remedy to which it may be entitled at law, in equity or under this Agreement.

8. OWNERSHIP OF DOCUMENTS

a. Consultant shall maintain complete and accurate records with respect to sales, costs, expenses, receipts and other such information required by City that relate to the performance of services under this Agreement. Consultant shall maintain adequate records of services provided in sufficient detail to permit an evaluation of services. All such records shall be maintained in accordance with generally accepted accounting principles and shall be clearly identified and readily accessible. Consultant shall provide free access to the representatives of City or its designees at reasonable times to such books and records, shall give City the right to examine and audit said books and records, shall permit City to make transcripts there from as necessary, and shall allow inspection of all work, data, documents, proceedings and activities related to this Agreement. Such records, together with supporting documents, shall be maintained for a period of three (3) years after receipt of final payment.

b. Upon completion of, or in the event of termination or suspension of this Agreement, all original documents, designs, drawings, maps, models, computer files containing data generated for the work, surveys, notes, and other documents prepared in the course of providing the services to be performed pursuant to this Agreement shall become the sole property of the City and may be used, reused or otherwise disposed of by the City without the permission of the Consultant. With respect to computer files containing data generated for the work, Consultant shall make available to the City, upon reasonable written request by the City, the necessary computer software and hardware for purposes of accessing, compiling, transferring and printing computer files.

9. INDEMNIFICATION

The Consultant agrees to defend, indemnify, protect and hold harmless the City of Temecula, Temecula Community Services District, and/or the Successor Agency to the Temecula Redevelopment Agency, its officers, officials, employees and volunteers from and against any and all claims, demands, losses, defense costs or expenses, including attorney fees and expert witness fees, or liability of any kind or nature which the City of Temecula, Temecula Community Services District, and/or the Successor Agency to the Temecula Redevelopment Agency, its officers, agents, employees or volunteers may sustain or incur or which may be imposed upon them for injury to or death of persons, or damage to property arising out of Consultant's negligent or wrongful acts or omissions arising out of or in any way related to the performance or non-performance of this Agreement, excepting only liability arising out of the negligence of the City of Temecula, Temecula Community Services District, and/or the Successor Agency to the Temecula Redevelopment Agency.

10. INSURANCE REQUIREMENTS

Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons and/or damages to property, which may arise from or in connection with the performance of the work hereunder and the results of work by the Consultant, its agents, representatives, employees, or subcontractors.

a. Minimum Scope of Insurance. Coverage shall be at least as broad as:

1) Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operation, property damage, bodily injury, and personal & advertising with limits no less than One Million (\$1,000,000) per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 05 09 or 25 04 05 09) or the general aggregate limit shall be twice the required occurrence limit.

2) Automobile Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Consultant has no owned autos, covering hired, (Code8) and non-owned autos (Code 9), with limits no less than One Million (\$1,000,000) per accident for bodily injury, including death, of one or more persons, property damage and personal injury.

3) Workers' Compensation: as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than One million (\$1,000,000) per accident for bodily injury or disease. In accordance with the provisions of Labor Code Section 3700, every Consultant will be required to secure the payment of compensation to it's employees. Pursuant to Labor Code Section 1861, Vendor must submit to City the following certification before beginning any work on the Improvements:

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

By executing this Agreement, Vendor is submitting the certification required above.

The policy must contain a waiver of subrogation in favor of the City of Temecula, the Temecula Community Services District, the Successor Agency to the Temecula Redevelopment Agency, their officers, officials, employees or volunteers.

b. Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared and approved by the Risk Manager.

c. Other Insurance Provisions. The insurance policies are to contain, or be endorsed to contain, the following provisions:

1) The City of Temecula, the Temecula Community Services District, the Successor Agency to the Temecula Redevelopment Agency, their officers, officials, employees and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant's products and completed operations of the Consultant; premises owned, occupied or used by the Vendor. General liability coverage can be provided in the form of an endorsement to the Consultant Insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used). The coverage shall contain no special limitations on the scope of protection afforded to the City of Temecula, the Temecula Community Services District, the Successor Agency to the Temecula Redevelopment Agency, their officers, officials, employees, or volunteers.

2) For any claims related to this project, the Consultant insurance coverage shall be primary and non-contributory and at least as broad as ISO CG 20 01 04 13 as respects the City, the Temecula Community Services District, the Successor Agency to the Temecula Redevelopment Agency, their officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City of Temecula, Temecula Community Services District, and/or the Successor Agency to the Temecula Redevelopment Agency, its officers, officials, employees, or volunteers shall be excess of the Consultant's insurance and shall not contribute with it. This also applies to any Excess or Umbrella liability policies.

3) The Consultant may use Umbrella or Excess Policies to provide the limits as required in this agreement. The Umbrella or Excess policies shall be provided on a true "following form" or broader coverage basis, with coverage at least as broad as provided on the underlying Commercial General Liability Insurance.

4) Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect the indemnification provided to the City of Temecula, the Temecula Community Services District, and/or the Successor Agency to the Temecula Redevelopment Agency, their officers, officials, employees, or volunteers.

5) The Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

6) If the Consultant's maintains broader coverage and/or higher limits than the minimums shown above, the City requires and shall be entitled to the broader coverage and/or higher limits maintained by the consultant.

7) If insurance coverage is canceled or, reduced in coverage or in limits the Consultant shall within two (2) business days of notice from insurer phone, fax, and/or notify the City via certified mail, return receipt requested of the changes to or cancellation of the policy.

8) Unless otherwise approved by City, if any part of the Services and Tasks is subcontracted, the Minimum Insurance Requirements must be provided by, or on behalf of, all subcontractors even if city has approved lesser insurance requirements for Consultant, and all subcontractors must agree in writing to be bound by the provisions of this section.

d. Acceptability of Insurers. Insurance required above, except for workers' compensation insurance, must be placed with insurers with a current A.M. Best rating of A-:VII or better, unless otherwise acceptable to the City. Self-insurance shall not be considered to comply with these insurance requirements.

e. Verification of Coverage. Consultant shall furnish the City with original certificates and amendatory endorsements, or copies of the applicable policy language affecting coverage required by this clause. All certificates and endorsements and copies of the Declarations & Endorsements pages are to be received and approved by the City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant obligation to provide them. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

f. Special Risks or Circumstances. The City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

11. INDEPENDENT CONTRACTOR

a. Consultant is and shall at all times remain as to the City a wholly independent contractor. The personnel performing the services under this Agreement on behalf of Consultant shall at all times be under Consultant's exclusive direction and control. Neither City nor any of its officers, employees, agents, or volunteers shall have control over the conduct of Consultant or any of Consultant's officers, employees, or agents except as set forth in this Agreement. Consultant shall not at any time or in any manner represent that it or any of its officers, employees or agents are in any manner officers, employees or agents of the City. Consultant shall not incur or have the power to incur any debt, obligation or liability whatever against City, or bind City in any manner.

b. No employee benefits shall be available to Consultant in connection with the performance of this Agreement. Except for the fees paid to Consultant as provided in the Agreement, City shall not pay salaries, wages, or other compensation to Consultant for performing services hereunder for City. City shall not be liable for compensation or indemnification to Consultant for injury or sickness arising out of performing services hereunder.

12. LEGAL RESPONSIBILITIES

The Consultant shall keep itself informed of all local, State and Federal ordinances, laws and regulations which in any manner affect those employed by it or in any way affect the performance of its service pursuant to this Agreement. The Consultant shall at all times observe and comply with all such ordinances, laws and regulations. The City, and its officers and employees, shall not be liable at law or in equity occasioned by failure of the Consultant to comply with this section.

13. RELEASE OF INFORMATION

a. All information gained by Consultant in performance of this Agreement shall be considered confidential and shall not be released by Consultant without City's prior written authorization. Consultant, its officers, employees, agents or subcontractors, shall not without written authorization from the City Manager or unless requested by the City Attorney, voluntarily provide declarations, letters of support, testimony at depositions, response to interrogatories or other information concerning the work performed under this Agreement or relating to any project or property located within the City. Response to a subpoena or court order shall not be considered "voluntary" provided Consultant gives City notice of such court order or subpoena.

b. Consultant shall promptly notify City should Consultant, its officers, employees, agents or subcontractors be served with any summons, complaint, subpoena, notice of deposition, request for documents, interrogatories, request for admissions or other discovery request, court order or subpoena from any party regarding this Agreement and the work performed there under or with respect to any project or property located within the City. City retains the right, but has no obligation, to represent Consultant and/or be present at any deposition, hearing or similar proceeding. Consultant agrees to cooperate fully with City and to provide City with the opportunity to review any response to discovery requests provided by Consultant. However, City's right to review any such response does not imply or mean the right by City to control, direct, or rewrite said response.

14. NOTICES

Any notices which either party may desire to give to the other party under this Agreement must be in writing and may be given either by (i) personal service, (ii) delivery by a reputable document delivery service, such as but not limited to, Federal Express, that provides a receipt showing date and time of delivery, or (iii) mailing in the United States Mail, certified mail, postage prepaid, return receipt requested, addressed to the address of the party as set forth below or at any other address as that party may later designate by Notice. Notice shall be effective upon delivery to the addresses specified below or on the third business day following deposit with the document delivery service or United States Mail as provided above.

Mailing Address: City of Temecula
Attn: City Manager
41000 Main Street
Temecula, CA 92590

**To Consultant: Sagecrest Planning and Environmental
Attn: Amy Vazquez
27128 Paseo Espada, Suite 1524
San Juan Capistrano, CA 92675**

15. ASSIGNMENT

The Consultant shall not assign the performance of this Agreement, nor any part thereof, nor any monies due hereunder, without prior written consent of the City. Upon termination of this Agreement, Consultant's sole compensation shall be payment for actual services performed up to, and including, the date of termination or as may be otherwise agreed to in writing between the City Council and the Consultant.

16. LICENSES

At all times during the term of this Agreement, Consultant shall have in full force and effect, all licenses required of it by law for the performance of the services described in this Agreement.

17. GOVERNING LAW

The City and Consultant understand and agree that the laws of the State of California shall govern the rights, obligations, duties and liabilities of the parties to this Agreement and also govern the interpretation of this Agreement. Any litigation concerning this Agreement shall take place in the municipal, superior, or federal district court with geographic jurisdiction over the City of Temecula. In the event such litigation is filed by one party against the other to enforce its rights under this Agreement, the prevailing party, as determined by the Court's judgment, shall be entitled to reasonable attorney fees and litigation expenses for the relief granted.

18. PROHIBITED INTEREST

No officer, or employee of the City of Temecula that has participated in the development of this agreement or its approval shall have any financial interest, direct or indirect, in this Agreement, the proceeds thereof, the Consultant, or Consultant's sub-contractors for this project, during his/her tenure or for one year thereafter. The Consultant hereby warrants and represents to the City that no officer or employee of the City of Temecula that has participated in the development of this agreement or its approval has any interest, whether contractual, non-contractual, financial or otherwise, in this transaction, the proceeds thereof, or in the business of the Consultant or Consultant's sub-contractors on this project. Consultant further agrees to notify the City in the event any such interest is discovered whether or not such interest is prohibited by law or this Agreement.

19. ENTIRE AGREEMENT

This Agreement contains the entire understanding between the parties relating to the obligations of the parties described in this Agreement. All prior or contemporaneous agreements, understandings, representations and statements, oral or written, are merged into this Agreement and shall be of no further force or effect. Each party is entering into this Agreement based solely upon the representations set forth herein and upon each party's own independent investigation of any and all facts such party deems material.

20. AUTHORITY TO EXECUTE THIS AGREEMENT

The person or persons executing this Agreement on behalf of Consultant warrants and represents that he or she has the authority to execute this Agreement on behalf of the Consultant and has the authority to bind Consultant to the performance of its obligations hereunder. The City Manager is authorized to enter into an amendment on behalf of the City to make the following non-substantive modifications to the agreement: (a) name changes; (b) extension of time; (c) non-monetary changes in scope of work; (d) agreement termination.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed the day and year first above written.

CITY OF TEMECULA

By: _____
Brenden Kalfus, Mayor

By:  _____
Amy Vazquez, CEO

ATTEST:

By: _____
Randi Johl, City Clerk



APPROVED AS TO FORM:

By: _____
Peter M. Thorson, City Attorney

CONSULTANT

Sagecrest Planning and Environmental
Amy Vazquez
27128 Paseo Espada, Suite 1524
San Juan Capistrano, CA 92675
(949) 996-7243
avazquez@sagecrestplanning.com

EXHIBIT A

Tasks to be Performed

All tasks to be performed are per the proposal provided by the Consultant attached hereto and incorporated herein as though set forth in full.



SAGECREST

PLANNING + ENVIRONMENTAL

PROPOSAL FOR CITY OF TEMECULA

LEAD AND ORGANIZE THE GENERAL PLAN UPDATE

PREPARED BY
Amy Vazquez, President
avazquez@sagecrestplanning.com

949.996.SAGE (7243)
www.sagecrestplanning.com
27128 Paseo Espada, Suite 1524, San Juan Capistrano, CA 92675



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SAGECREST
PLANNING + ENVIRONMENTAL

November 1, 2024

City of Temecula
Community Development Department
Attn: Mark Collins
41000 Main Street
Temecula, CA 92065

SUBJECT: PROPOSAL TO LEAD AND ORGANIZE THE CITY'S GENERAL PLAN UPDATE

Dear Mr. Collins,

Sagecrest Planning + Environmental (Sagecrest) is pleased to submit this proposal to the City of Temecula (City) to lead and organize a comprehensive update to the City's General Plan, including a Climate Action Plan and Program EIR. Sagecrest is an award winning, full service, professional planning firm providing long range and current planning, land use, and environmental consulting. Founded in 2017, the Sagecrest team practices a broad range of land use planning, ordinance preparation, development activities, and California Environmental Quality Act (CEQA) compliance. Our planners have expertise in discretionary case processing, preparation and review of zoning codes, specific plans, general plans, code compliance, project management, and environmental analysis, documentation, and review.

Sagecrest planners have extensive experience as contract planning staff to public agencies throughout California, giving us a unique and thorough understanding of the processes and the challenges faced by planning departments. Our public sector experience makes Sagecrest uniquely qualified to deliver high-quality project management services for the City of Temecula's comprehensive General Plan Update. Our accomplished and capable professionals have the skills and qualifications to assist the City of Temecula in selecting and managing a Consultant and providing technical assistance throughout the General Plan Update process.

The key personnel for the City of Temecula's general plan update project will be Laurel Reimer, AICP, Principal, with additional support provided by Lexie Abrahamian, AICP, and Dan Long. Amy Vazquez, President, will be the primary contact for any contract-related matters. Ms. Reimer will be responsible for the day-to-day project management, coordinating with City staff and the Consultant team, attending all meetings, reviewing all deliverables, and overall quality control. Ms. Abrahamian will provide technical assistance and attend key meetings. Mr. Long will assist with community introductions.



Ms. Reimer has worked in the planning field since 2008 and has experience in dozens of jurisdictions throughout the West Coast. She has a keen understanding of government procedures, laws, ordinances, and zoning. In her role as a Principal at Sagecrest, Ms. Reimer works with public sector and private sector clients. She manages complex current planning projects on behalf of jurisdictions, including analyzing projects for compliance with current codes, coordinating interdepartmental review, ensuring compliance with CEQA, and preparing and presenting staff reports to Planning Commissions and City Councils. She is especially passionate about advance planning and has prepared multiple zoning code amendments to bring jurisdictions into compliance with State laws, including SB9 and State Density Bonus. For private sector clients, Ms. Reimer coordinates multidisciplinary teams for residential, commercial, and industrial entitlement application submittal and processing. Ms. Reimer regularly manages projects that require coordination of staff, consultant teams, stakeholders, and community members.

Ms. Reimer is an enthusiastic and dedicated planner. She served five(5) years on the board of the American Planning Association Orange Section and ten (10) years on the Orange County Transportation Authority's Citizens Advisory Committee. She is currently a member of the City of Brea's Community Steering Committee for the Focused General Plan Update and Brea Core Specific Plan. She keeps abreast of state legislation related to planning and housing issues.

Sagecrest looks forward to this opportunity to work with the City of Temecula. If you require additional information or would like to further discuss our qualifications, please contact me directly by phone 714.914.5605 or email avazquez@sagecrestplanning.com.

Respectfully,

A handwritten signature in blue ink that reads "Amy Vazquez".

Amy Vazquez, President
Sagecrest Planning + Environmental

949.996.SAGE (7243)
info@sagecrestplanning.com
www.sagecrestplanning.com

27128 Paseo Espada, Suite 1524, San Juan Capistrano, CA 92675



2. CRITICAL OVERVIEW

The City of Temecula's General Plan was initially adopted in 1993 and last comprehensively updated in 2005. The current General Plan contains 11 chapters, covering all General Plan elements required by the Office of Land Use and Climate Innovation (LCI) General Plan Guidelines, as well as four (4) optional elements. However, there has been a great deal of change since 2005. First, Temecula's population and economy have both continued to grow steadily, with the number of households growing by nearly 14% from 2010 to 2020 alone. The City's success as a tourist destination has also grown, with travel and tourism in the Temecula Valley infusing more than 1 billion dollars into the local economy in 2023. Second, the legal landscape surrounding General Plans has changed in recent years, resulting in new content requirements for General Plan Updates that must be addressed to comply with State law.

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Though the current General Plan has served the City of Temecula well for the last two (2) decades, it can be made a more effective and strategic guide for decision-making and public use with updates to incorporate current General Plan requirements, best practices, and community input.

General Plan Requirements

Many of the needed updates to Temecula's General Plan to comply with changes in State law are related to how jurisdictions measure and mitigate climate change impacts. Though content updates pertaining to climate change will be required throughout the General Plan elements, this section only highlights a few key examples. In accordance with AB 32, local governments are required to establish a greenhouse gas (GHG) emissions reduction plan either as a stand-alone Climate Action Plan document or directly as part of the General Plan Update. Regardless of the approach the City decides to take, the Climate Action Plan requirement must be met by inventorying GHG emissions within the City, identifying actions to mitigate emissions, and ensuring consistency between policies in the Climate Action Plan and General Plan elements.

SB 743 requires local jurisdictions to measure transportation impacts using vehicle miles traveled (VMT) in the CEQA process. Due to SB 743 and the connection it establishes between transportation funding and GHG emissions reduction, discussion of VMT has become an essential part of the Circulation Element. To remain consistent with State law, an update to the Circulation and Land Use Elements should 1) incorporate analysis from the City's Traffic Impact Analysis Guidelines adopted in 2020, and 2) balance level of service analysis and related goals with data analysis and policies based on VMT. This includes more goals, policies, and programs related to active transportation, public transit, and transit-oriented development – actions that help reduce VMT.

Similarly, significant updates to the Safety Element are required to include discussion of Climate Change Adaptation and Resilience. In accordance with SB 379, local governments are required to include a climate change vulnerability assessment, measures to address vulnerabilities, and comprehensive hazard mitigation and emergency response strategies. An updated Safety element should complement



Temecula's 2022-2027 Local Hazard Mitigation Plan and can incorporate the vulnerability assessment and adaptation measures included in the Local Hazard Mitigation Plan.

In general, each mandatory element in Temecula's General Plan should be reviewed for consistency with all element requirements of the LCI General Plan Guidelines. For example, if the City were to combine the Open Space and Conservation elements into one chapter, we would need to ensure the chapter includes all required content of each element. Government Code section 65302(d)(1) requires discussion of soils as a natural resource in the Conservation element, but this resource is not specifically described in the Open Space/Conservation chapter of the existing General Plan. This chapter also does not address all the different types of open space within the City in an inventory as required by the General Plan Guidelines. These examples demonstrate the need to create a thorough checklist of all missing items in the existing General Plan based on the LCI Guidelines.

Best Practices

In addition to the new General Plan requirements that must be addressed in the forthcoming update, several changes are recommended to keep Temecula's General Plan abreast of current best practices. To begin, the General Plan Update should bolster the analysis of key topic areas with more data. For example, LCI recommends that the Land Use element should examine population data, including regional and local population and growth forecasts, and identify demographic trends (age, income, persons per household, vehicle ownership rates, etc.) The existing Land Use element provides only the minimum required data in the buildout assumptions table (Table LU-3) and provides little discussion of how this data or other data are connected to land use goals and policies. Other elements that would benefit from the inclusion of more data analysis and visualization are the Circulation and Safety elements. In particular, these elements should incorporate more data analysis and visualization to illustrate changes in existing conditions and the potential impact of proposed policies on topics such as greenhouse gas reduction and climate change vulnerability.

Furthermore, the General Plan should include improved formatting for legibility and clarity, with special attention to headings and document navigation. In the initial review of the current General Plan, there were several instances where it was difficult to determine which text is a heading and which is a subheading, leading to overall confusion about what section of the element is being shown. Adding a consistent numbering system to the headings and subheadings (e.g., "Chapter 4, 4.1 Introduction") would provide for easier navigation of the document. Beyond legibility, a new graphic design with updated colors, fonts, and imagery would help modernize the document and improve how users engage with the document.

As a best practice, the City of Temecula should make updates to the General Plan's optional elements based on the priorities established through community and stakeholder engagement. First, the City should determine whether it wants to incorporate an Environmental Justice element in the General Plan Update. This element



is optional based on the CalEnviroScreen data, which show that Temecula does not have disadvantaged communities as defined by State law; however, LCI strongly encourages jurisdictions without formally defined disadvantaged communities to consider creating an optional Environmental Justice element in order to promote equity and protect human health in their community. Second, the current General Plan includes four (4) optional elements: Community Design, Economic Development, Public Facilities, and Air Quality. Each of these should be updated based on new data analysis and rigorous community engagement with diverse community stakeholders. Updates to the Community Design and Economic Development elements, in particular, present opportunities to reflect current best practices. The Community Design element should be updated to be consistent with any new relevant plans, such as the 2024 Old Town Specific Plan Update, and the Economic Development element might discuss new economic development tools such as community benefit funds and value capture.

Community Input and Analysis

Finally, an update to Temecula's General Plan will require extensive community outreach and engagement to ensure that new analysis, goals, policies, and programs accurately reflect the interests of Temecula today. Before beginning the engagement process, the Consultant team should prepare a thorough analysis of available quantitative data to form a profile of present-day Temecula; this should include demographic/social data and economic/market data. Conducting this quantitative analysis first helps provide an initial understanding of who currently lives and works in Temecula and should help inform a community engagement strategy to reach as many different groups of stakeholders as possible. For example, pre-engagement stakeholder analysis can help identify 1) newer neighborhoods within the City to ensure engagement is balanced between new and existing residents; 2) potential barriers to reaching different groups of stakeholders, such as language access; and 3) potential demographic, social, and economic trends that form essential context for our engagement with the community. These factors should be addressed in a community engagement strategy that aims to reach a wide range of community stakeholders, including residents, local business owners, and the development community, among others.

A general plan is only as good as the information inputs used to craft new goals and policies. Due to the amount of time that has passed since the General Plan was comprehensively updated, gathering and analyzing new quantitative and qualitative data must be a priority. The end goal is to understand the priorities and concerns of today's population so that these ideas can be reflected in new goals and policies.

In managing the General Plan Update process, Sagecrest will help direct the Update to include best practices and innovative approaches to complex issues as discussed above. We plan to achieve this through several methods. First, through management of the Consultant team preparing the General Plan Update, we will ensure all new General Plan requirements of State law are addressed. Sagecrest will collaborate with the Consultant team on establishing a checklist of required updates for each element and ensure quality control through multiple rounds of review of draft elements. Second, the



General Plan Update will follow a design-forward approach to ensure user-friendliness of the new document. This begins with the selection of a consulting firm that leads with this value. Sagecrest's role in achieving this goal will be to act as a "checkpoint" in the General Plan Update process, serving as an extra level of review with a lens focused on the experience of end users of the document. Last, authentic community engagement will be a priority throughout the General Plan Update process. Sagecrest will assist with selecting a Consultant for the General Plan Update that will uphold this value and make sure community engagement is reflected in the Plan's updated vision, goals, policies, and implementation programs.

3. SCOPE OF WORK AND TIMELINE

Task 1: Project Start-Up (months 1 – 3)

Upon issuance of a Notice to Proceed (NTP), Sagecrest will complete the following tasks to assist the City with evaluation, selection, and contract approval of the Consultant for the comprehensive update to the General Plan, including Climate Action Plan and Program EIR (Project).

TASK 1.1: KICKOFF MEETING(S) WITH CITY STAFF

Sagecrest will meet with City Staff to kick off the Project, including introductions, coordinating roles and responsibilities between Sagecrest and City Staff, and identifying key internal and external stakeholders in the Project.

TASK 1.2: DRAFT REQUEST FOR PROPOSALS

In coordination with and at the direction of City Staff, Sagecrest will draft and release an RFP for a General Plan Update Consultant to perform the Project.

TASK 1.3: REVIEW PROPOSALS

Sagecrest will assist the City with the review and selection process. Sagecrest will coordinate with the City to receive and distribute the Project proposals to the members of the interview panel for their review and evaluation.

TASK 1.4: COORDINATE INTERVIEWS

Sagecrest will assist City Staff with scheduling the interview panelists and Consultants.

TASK 1.5: INTERVIEW PANEL

Sagecrest will participate in the interview panel and assist City Staff with tabulating the scores of the interview panelists to identify the top scoring Consultant.

TASK 1.6: CONSULTANT SELECTION

Sagecrest will assist City Staff with the notification of the selected Consultant and notify the teams that were not selected.



TASK 1.7: STAFF REPORT

Sagecrest will assist City Staff with writing the staff report and managing its review and approval prior to it being placed on the City Council agenda.

TASK 1.8: CITY COUNCIL MEETING

Sagecrest will assist City Staff with the preparation of a presentation and attend the City Council meeting for the award of the Consultant for the Project.

TASK 1.9: KICKOFF MEETING(S) WITH CITY STAFF AND CONSULTANT

Upon issuance of the NTP for the Consultant, Sagecrest will coordinate the Kickoff meeting with City Staff and the Consultant, including setting the agenda, inviting attendees, recording minutes, assigning action items and a follow-up plan. Other priorities of the Kickoff Meeting will include the following:

- Confirm/finalize scope of work and schedule for both the General Plan Update and Climate Action Plan (CAP)
- Define the relationship between the General Plan Update and the CAP

Task 1 Deliverables:

- Request for Proposals
- Evaluations of Consultant proposals
- Staff report and presentation for the Consultant selection
- Meeting agendas, minutes, action items, follow-up plan

Task 2: Community Outreach and Engagement (months 4 – 20)

Community outreach and engagement is inherent in all phases of the Project. Items in Task 2 reflect the creation and maintenance of the framework in which the community engagement will take place.

TASK 2.1: LIAISON ROLE

Sagecrest will coordinate with City Staff and the Consultant to plan and implement all aspects of the Community Engagement Strategy.

TASK 2.2: COMMUNITY ENGAGEMENT FRAMEWORK

Sagecrest will coordinate with City Staff and the Consultant to create a framework for outreach to all segments of the community, with a focus on reaching those members who do not regularly engage in planning processes. The framework will identify: 1. Target audiences; 2. All existing channels to reach each target audience i.e. community-based organizations, festivals, seasonal events, school-based events, business networking groups, parent groups, board meetings for other agencies, City communication tools (website, social media, etc.); 3. Contact list and forecast of the meeting calendar of each channel, as applicable; 4. Identify gaps in channels to target audiences and create relationships with leaders in that space to integrate the audience into the community outreach framework.



TASK 2.3: OUTREACH TOOLBOX

Early in the community engagement process, Sagecrest will work with the Consultant and City Staff to create a toolbox that includes a description of each type of engagement activity in the engagement strategy i.e. town halls, workshops, charettes, focus groups, interviews, surveys, study sessions, community meetings, exhibits and pop ups, web-based apps, and canvassing as a guide to match the most effective tool with the target audience. Basic parameters for each type of engagement strategy will be identified to assist in the planning and management, such as estimated number of attendees, facility requirements, time of day/day of week, amenities provided such as meals and childcare, types and quantities of printed materials required, and City Staff/Consultant team members who should attend.

TASK 2.4: MASTER CALENDAR

Sagecrest will create a master calendar for community engagement that will synchronize Project milestones with the desired community engagement activities that are needed to inform the Consultant's work products. Emphasis will be placed on best leveraging seasonal and recurring events or meetings and identifying when more casual or impromptu engagement activities are appropriate.

TASK 2.5: PUBLIC POINT OF CONTACT FOR THE UPDATE

Sagecrest will serve as the point of contact for all public communication related to Project activities and events. Sagecrest will maintain a log of input from the public such as messages, phone calls, emails, inquiries, and comment cards submitted through community engagement activities. Sagecrest will provide a monthly summary report of contacts/events/announcements deployed through the community engagement strategy to City Staff and the Consultant, including themes of input received.

TASK 2.6: FINAL ENGAGEMENT SUMMARY REPORT

Sagecrest will oversee the development of a final engagement summary report by the Consultant. This report will provide detailed documentation of all outreach efforts and notification tactics, describe the outreach activities conducted, summarize key stakeholder groups that were engaged, and include a detailed appendix containing all milestone summary reports, outreach collateral, event photos, and raw input from all activities.

Task 2 Deliverables:

- Community engagement framework document
- Outreach toolbox
- Master calendar
- Database log of public input
- Review and comments provided for final engagement summary report



Task 3: Audit of Existing General Plan and Specific Plans (month 4)

A comprehensive review of the following policy documents will be undertaken to build upon work accomplished by the City during previous phases of the General Plan Update process:

- *Existing General Plan*: The Consultant will conduct an assessment of its goals, policies, and implementation actions.
- *Existing Specific Plans*: An audit of the City's 15 existing specific plans with recommendations for the future disposition of each plan; outline which portions can be incorporated into the General Plan versus what will need to be updated independently.
- *Infrastructure Policy*: A review of existing City policy documents such as the Quality of Life Master Plan and any infrastructure-related master plans (sewer, recycled water, etc.)
- *A summary of State legislation* requiring compliance for every Element of the General Plan

Sagecrest will collaborate and coordinate with the Consultant in the review of policy documents and preparation of summary analysis memoranda.

Task 3 Deliverables:

- Existing Policy Framework Memorandum
- Matrices highlighting all existing policy relationships and conflicts
- Review of Existing Policy Framework Memorandum and Matrices

Task 4: Existing Conditions Data Collection and Analysis (months 4 – 7)

TASK 4.1: BEST PRACTICES

In this task, the Consultant will create a best practices memorandum that builds on the existing policy framework memorandum and highlights the following:

- Best practices and emerging tools for general plans
- Innovative and unique elements that can be applied to the City evaluation of applicability and recommendations

TASK 4.2: EXISTING CONDITIONS REPORT

The Consultant will collect and analyze data for all elements included in the General Plan Update. This includes all mandatory elements that require updates – Land Use, Circulation, Open Space, Conservation, Public Safety, and Noise – as well as optional element updates to be established in the final scope of work. Additionally, data collection and analysis for the CAP will take place at this time to ensure consistency in data reporting between the General Plan and CAP.

TASK 4.3: REVIEW AND COMMENT ON EXISTING CONDITIONS DELIVERABLES

Sagecrest will coordinate with the Consultant to facilitate the development of the existing policy framework memorandum and existing conditions report, including review of draft documents.



Task 4 Deliverables:

- Best practices memorandum
- Existing conditions report
- Review and comments provided for memorandum and report

Task 5: Visioning (months 4 – 10)

Sagecrest will serve as the liaison between City Staff, the Consultant, stakeholders, and the community during the visioning phase of the Project. The Consultant will create a Visioning Work Plan that will engage all parties in a shared dialogue about Temecula's future and develop guiding principles for the Project and result in highly visual maps, diagrams, and graphics in addition to a narrative vision statement.

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TASK 5.1: LIAISON ROLE AND REVIEW OF DELIVERABLES

Sagecrest will serve as the liaison between City Staff, the Consultant, stakeholders, and the community during the visioning phase of the Project.

TASK 5.2: VISIONING MEETINGS

Sagecrest will serve as the point of contact and organizer for all internal and external meetings, workshops, and outreach events to be identified in the Consultant work plan. Sagecrest will organize all scheduling, logistics, invitations, notices, announcements, and RSVPs and assist the Consultant with production and management of all materials generated for the visioning meetings.

TASK 5.3: IDENTIFICATION OF FOCUS AREAS

In conjunction with robust community outreach, the Consultant will work with the City and community to identify focus areas to prioritize for enhanced community engagement and urban design concepts. This analysis will be delivered as a Focus Area Report and will include:

- Maps of each focus area
- A brief discussion of why that area was selected
- An analysis of the focus area (physical and demographic)
- An evaluation of the walkability of each focus area

TASK 5.4: ISSUES AND OPPORTUNITIES

Part of the visioning process is working with the community to identify the values and priorities that they feel are most important to address during the General Plan Update. As part of this task, the Consultant will work with the community to:

- Identify issues and trends shaping the City and the region
- Identify strengths, weaknesses, opportunities, and threats to the City's future
- Assess the community's opinion on the status of planning efforts, including the current General Plan, specific plans, and other planning efforts
- Obtain feedback on General Plan topics, including mobility and circulation, land use, housing, and conservation and open space



TASK 5.5: COMMUNITY ATLAS AND VISIONING DOCUMENT

As a result of the community outreach conducted during the visioning process, the Consultant will synthesize information from the community, analysis conducted during the existing conditions stage, and recommendations from the Consultant and City in order to develop the Community Atlas and Visioning Document. The Community Atlas and Visioning Document will include:

- Guiding principles and long-term goals for sustainability, growth, resiliency and climate adaptation, preservation, conservation, and mobility
- General Plan Vision Statement
- Discussion on the focus areas
- A community profile, including population and demographic data to inform the plan's equity focus, as well as an outline of the historical context and past actions that have led to inequities and disproportionate impacts.

Task 5 Deliverables:

- (2) Consultant Team Meetings
- (5) City Staff Technical Advisory Team Meetings
- (10) Stakeholder Meetings
- (5) General Plan Advisory Committee Meetings
- (25) Community Engagement Events
- (2) Boards and Commissions Workshops
- (2) Planning Commission Workshops and (2) City Council Workshops
- Meeting agendas, minutes, action items, follow-up plan
- Focus Area Report
- Community Atlas and Visioning Document
- Review and comments on draft reports

Task 6: Plan Alternatives and Update of General Plan Elements (months 8 – 16)

TASK 6.1: LAND USE ALTERNATIVES REPORT

Building on the Existing Conditions Report, the first step in developing the Land Use Alternatives is a discussion with the City, community, and stakeholders to identify areas where change is necessary or desired, potential options for change areas, and General Plan land use categories. This discussion will lead to the development of three land use scenarios or alternatives. Once three alternatives are identified, each alternative will be analyzed to determine potential growth effects and the alternative's consistency with the community's vision in categories such as land use, mobility, equity, provision of city services, economic and fiscal, and sustainability and environment. Since transportation and land use go hand-in-hand, alternative transportation concepts and facilities will be considered in conjunction with alternative land use patterns. The Land Use Alternatives Report will provide a summary of community input related to land use changes and three land use map alternatives. This document will serve as the primary tool to aid the City in determining the appropriate future strategic growth areas for the Project.



TASK 6.2: URBAN DESIGN SCENARIOS

In this task, the Consultant will work with the community to develop and test some urban design scenarios for each of the focus areas. The input received at the pop-up events and the workshops will inform the development of the urban design scenarios. This will be a fact sheet style report that articulates the vision and future development potential for each of the focus areas.

TASK 6.3: SELECTION OF PREFERRED ALTERNATIVE

The Consultant will present the Land Use Alternatives Report for public review, along with the General Plan Advisory Committee, Planning Commission, and City Council, inviting their insights and suggestions. Guided by the feedback obtained, the Consultant will devise a Preferred Land Use Plan and carry out requisite analysis to shape a project description for the EIR.

TASK 6.4: UPDATE OF THE GENERAL PLAN ELEMENTS

As part of this task, the Consultant will update all of the General Plan elements as established in the finalized scope of work for the Project.

TASK 6.5: REVIEW OF DELIVERABLES

As Project Manager, Sagecrest will coordinate with the Consultant to facilitate the development of deliverables, including providing comments on draft documents.

Task 6 Deliverables:

- Land Use Alternatives Report
- Urban Design Scenarios
- Preferred alternative and build-out summary, fiscal and traffic analysis
- Working Draft 1
- Working Draft 2
- Administrative Draft
- Public Review Draft
- Revised Draft and Final Draft

Task 7: Goals, Policies, Programs, & Maps (months 10–14)

A key component of the General Plan will be the updated goals, policies, and actions. In this task, the Consultant will synthesize the information gathered from both the outreach process as well as the technical reports. The Consultant will develop a set of comprehensive and cohesive goals with supporting policies and implementing actions. The Consultant will identify needed updates to existing specific plans. It will also include an update to the General Plan maps and exhibits, as well as the final document outline and format. Sagecrest will coordinate with the Consultant to develop deliverables that demonstrate progress on updating goals, policies, programs, and maps of the General Plan. Sagecrest's role as a liaison will include review of draft deliverables.

Task 7 Deliverables:

- General Plan Goals, Policies, and Implementation Programs
- Identification of needed updates to Specific Plans



- General Plan maps and exhibits
- General Plan outline and document format

Task 8: Draft General Plan and Revised Specific Plans (months 14 – 20)

TASK 8.1: FOCUS AREA URBAN DESIGN CONCEPTS

For this task, the urban design concepts conceptualized earlier will be fully rendered in conjunction with the feedback received from the community and the direction of City Staff. The designs for the focus areas will be incorporated into the Draft General Plan.

TASK 8.2: DRAFT GENERAL PLAN

The final steps to producing a high-quality General Plan are the visuals, graphics, and overall format of the document. The General Plan will be graphics-rich and filled with diagrams, photos, and infographics to explain the key components.

TASK 8.3: UPDATED SPECIFIC PLANS

As part of this task, the Consultant will also make focused updates to specific plans for those areas where additional guidance on land use outcomes is necessary. The Consultant will undertake the following steps:

- Prioritization List – A list of recommendations for focused updates to be made to specific plans. Recommendations may also include adding actions under Task 9 for repealing or incorporating specific plans into the General Plan or zoning regulations.
- Updates of specific plans in alignment with the prioritization list.

TASK 8.4: REVIEW OF DELIVERABLES

Sagecrest will coordinate with the Consultant to facilitate the development of deliverables, including providing comments on draft documents.

Task 8 Deliverables:

- Administrative and Public Review Draft General Plan
- Administrative and Public Review Draft Specific Plans
- Sagecrest review of draft General Plan and Specific Plans

Task 9: Municipal Code & Design Guidelines Update (months 17 – 20)

TASK 9.1: ZONING CODE CONSISTENCY EVALUATION

The Consultant will evaluate the existing Zoning Code (Code) for consistency of the current General Plan and Zoning Ordinance. The Consultant will prepare a matrix of General Plan Policies and Actions that may require changes or revisions to the Code. The matrix will identify the applicable titles, sections, and chapters of the Code that will need to be updated to bring the Code into full consistency with the General Plan.

TASK 9.2: TARGETED ZONING CODE UPDATE

For this task, the Consultant will work through the matrix to prepare a targeted update of the Zoning Code to bring the Code into full consistency with the General Plan.



TASK 9.3: CITYWIDE DESIGN GUIDELINES

For this task, the Consultant will work with the City to make needed updates to the Citywide Design Guidelines. The Consultant will work through the guidelines to identify:

- What currently does and does not work (with feedback from City)
- Subjective standards in need of updating
- Excessive, overly restrictive, or unrealistic standards
- Contradictory, complex, or confusing language or instructions
- Areas where greater clarity, flexibility, or brevity would enhance opportunities for adaptability or future development

After working through these initial questions, the Consultant will draft objective design standards that respond to the needs of the community. The Consultant will put a special emphasis on providing guidance for different land use types, streamlining the provision of housing and other priority areas for the City.

TASK 9.4: REVIEW OF DELIVERABLES

Sagecrest will coordinate with the Consultant and City staff to facilitate the development of deliverables, including providing comments on draft documents.

Task 9 Deliverables:

- General Plan Policies and Actions Updates Matrix
- Admin, Public Review, and Final Targeted Zoning Code Update Drafts
- Draft and Final Citywide Design Guidelines
- Sagecrest review of all deliverables

Task 10: Coordination of Program EIR (months 9 – 23)

TASK 10.1: DATA COLLECTION, SCOPING, AND INTERNAL COMMUNICATION

Sagecrest will assist City Staff and the Consultant with assembling all data required for the Program Environmental Impact Report (PEIR), internal scoping with City Staff, and organize the PEIR scoping meeting with the public and responsible agencies.

TASK 10.2: OVERSEE CONSULTANT TEAM WORK PRODUCT

Sagecrest will work closely with the Consultant to review, comment, and provide input on all work products of the Consultant, including the technical studies, Administrative Draft PEIR, Public Review Draft PEIR, notices, Mitigation Monitoring and Reporting Program, and Final PEIR. Sagecrest will provide iterative feedback between City Staff and the Consultant during the drafting of the PEIR.

TASK 10.3: REVIEW AND COMMENT ON PEIR DELIVERABLES

Sagecrest will receive and distribute PEIR deliverables to all internal and external reviewers. Sagecrest will organize and manage City Staff Technical Advisory Team Meetings for in-depth discussion on PEIR sections relevant to their area of expertise. Sagecrest will collect the written and verbal comments from all reviewers and compile them into one comprehensive set of comments and integrate them into the Word document with tracked changes. Sagecrest anticipates that each PEIR deliverable will undergo two rounds of review and comment, and will ensure that comments received on previous rounds of review are adequately addressed and resolved.



TASK 10.4: INTERNAL AND EXTERNAL MEETINGS AND PUBLIC MEETINGS

Sagecrest will serve as the point of contact and organizer for all internal and external meetings identified in the Consultant Work Plan. Sagecrest will organize all scheduling, logistics, invitations, notices, announcements, and RSVPs and assist the Consultant with production and management of all materials generated for the PEIR meetings.

Task 10 Deliverables:

- Consolidated comments in tracked changes for each deliverable
- (Meeting assumptions to be reconciled with Consultant Work Plan)
- (1) Scoping meeting and (1) public meeting
- (3) City Staff Technical Advisory Team Meetings
- (2) Stakeholder meetings
- (3) General Plan Advisory Committee Meetings
- Meeting agendas, minutes, actions items, follow-up plan

Task 11: Special Initiatives (TBD)

Sagecrest will serve as the liaison with City Staff and the Consultant for all matters related to special initiatives identified in the Consultant Work Plan.

Task 11 Deliverables:

- Meeting Agendas, Minutes, Actions Items, Follow Up Plan

Task 12: Plan Adoption (month 26)

Sagecrest will support City Staff and the Consultant in all activities related to the adoption of the PEIR, Updated General Plan, Targeted Zoning Code Update and Design Guidelines, and Specific Plans.

TASK 12.1: GENERAL PLAN REFERRAL

Sagecrest will coordinate the referral of the Draft General Plan to neighboring jurisdictions, special districts, school districts, LAFCO, SCAG, and Native American Tribes as required by State Law.

TASK 12.2: PLANNING COMMISSION AND CITY COUNCIL

Sagecrest will coordinate with City Staff and the Consultant to prepare staff reports and presentations for the Planning Commission and the City Council.

Task 12 Deliverables:

- Staff Report and PowerPoint Presentation

Task 13: Project Management (months 1 – 26)

TASK 13.1: CONSULTANT TEAM CONTRACT ADMINISTRATION

Sagecrest will administer the Professional Services Agreement, review and approve invoices, monitor the Project budget and schedule, and complete ongoing review of compliance with contract terms and the Scope of Services for the Consultant.



TASK 13.2: ANALYZE GPA AND ZONING CODE AMENDMENT REQUESTS

Sagecrest will receive, analyze, and make recommendations to City Staff relating to requests from applicants and/or City-initiated requests for General Plan Amendments, Zoning Code Amendments, and other planning document amendments in relation to the Project.

TASK 13.3: LEGISLATIVE UPDATES

Sagecrest will monitor, review, and make recommendations to City Staff regarding proposed legislation and planning activities at State, Regional, and Intra-Jurisdictional levels.

TASK 13.4: GRANT FUNDING AND COORDINATION

Sagecrest will assist City Staff in pursuit of planning grants and funding opportunities, as needed. Sagecrest will also assist City Staff in coordinating the work products relating to the Project for grants such as the SB 2 grant program.

TASK 13.5: ADMINISTRATION

Sagecrest will perform general administration activities as needed, such as attend staff meetings and respond to inquiries by phone or email not otherwise in the Scope of Work.

TASK 13.6: WEBSITE MANAGEMENT

Sagecrest will assist City Staff and the Consultant with the creation of content for the Update website, post all updates, maintain a published calendar of community engagement activities, and receive web-based public comments.

Task 13 Deliverables:

- Approved invoices
- Monthly tracking of Consultant tasks to schedule and budget
- Written recommendations to City Staff on development applications
- Legislative updates
- Grant applications
- Regularly updated website

4. QUALIFICATIONS

The Sagecrest team has experience in a broad range of land use planning, ordinance preparation, development activities, and California Environmental Quality Act (CEQA) compliance. The American Planning Association awarded Sagecrest the 2018 Emerging Planning & Design Firm by the Orange Section, the 2019 Grassroots Initiative Award by the California Chapter and the Orange Section, and the 2024 Urban Design Award by the Orange Section.

The Sagecrest team is comprised of a diverse group of planners and professionals with expertise in urban planning and design, environmental planning, public policy, GIS, and project management. Sagecrest team members have a complementary blend of both private sector and public sector experience. Our extensive knowledge working as public



sector planners, managing private entity projects, and providing in-house environmental review gives us a unique insight into the interdisciplinary coordination required to complete projects that other consulting firms may not have. With considerable experience in California, we have strong working relationships with key municipal staff, technical subconsultants, and public officials. The Sagecrest planners maintain their expertise through annual training. Our team is recognized for our collaborative and insightful approach that results in high quality work and proven results.

We ensure this high level of quality by employing the following practices:

- Our reputation is our most valuable asset. We do not overcommit our staff and only accept work that our staff has the qualifications to perform.
- Our staff maintains ongoing professional development and we provide extensive training in project management, land use law, California Environmental Quality Act (CEQA), writing and public presentation skills.
- We are based in San Juan Capistrano, maintain regular office hours, and are accessible as needed.
- We reliably meet departmental standards, including deadlines, quality of work products, courtesy and accessibility, accuracy of reports and information given to the public, and responsiveness.
- We will have a clear understanding of expectations and maintain consistent communication with our clients.
- We are committed to providing services that are cost effective while maintaining high standards of quality and productivity.

City of Santa Fe Springs – General Plan Update and Targeted Zoning Code Update

Ms. Reimer managed the City of Santa Fe Springs [Comprehensive General Plan Update](#) and Targeted Zoning Code Update, which was the City's first comprehensive general plan update in over 25 years. The project required a complete rewrite of the general plan and included a Housing Element Update and Public Engagement Program. The City also added an Environmental Justice Element and Economic Development Element. Ms. Reimer was involved in every step of the project. She assisted in drafting the RFP, interviewed Consultants, recruited the General Plan Advisory Group members and served as the staff liaison, collected data for the Consultant team, attended all outreach events, reviewed all deliverables, and prepared staff reports and resolutions for plan adoption. Additionally, the project was partially funded by a Caltrans grant and required careful time and budget tracking.

Ms. Reimer also prepared and reviewed multiple zoning code updates to bring the code into conformance with the updated general plan. Zoning code updates included a complete rewrite of the nonconforming provisions, the addition of high density residential and mixed-use standards, objective development standards, and various clean-up items.

Project Dates: October 2019 – February 2022 (General Plan)

City of Temecula – Lead and Organize the General Plan Update



February 2022 – September 2024 (Zoning Code Update)

City of Santa Fe Springs – Active Transportation Plan

Ms. Reimer served as the staff lead for the City of Santa Fe Springs' [Active Transportation Plan](#). The project was funded by the Disadvantaged Communities Planning Initiative through SCAG . She recruited steering committee members, compiled data for the Consultant, assisted the Consultant with meeting facilitation and public outreach, identified infrastructure needs and deficiencies, reviewed all deliverables, and prepared staff reports and resolutions for plan adoption. The policies, programs, projects, and recommendations in the plan promote an environment that enhances active transportation in the City, and makes walking and biking a safe, healthy, and enjoyable means of transportation and recreation.

Project Dates: February 2019 – January 2021

City of Rio Vista – Comprehensive General Plan Update

With her previous employer, Ms. Abrahamian worked closely with members of her team, City staff, and subconsultant teams to complete a Comprehensive General Plan Update for the City of Rio Vista. A Preliminary Final Draft of the [2024 General Plan](#) has been released, with the Plan nearing adoption. The General Plan Update included updates to the Introduction, Land Use, Mobility and Circulation, Economic Development, Parks and Recreation, Open Space and Resource Conservation, Public Facilities and Services, Safety, and Noise elements. Ms. Abrahamian's role on the Consultant team included facilitating community engagement and preparing materials for community engagement events; drafting general plan elements and revising elements based on comments from City staff and the General Plan Working Group; GIS mapping, data analysis, and policy research; and coordination with subconsultants.

Project Dates: December 2021 – June 2024

Clackamas County – Natural Hazard Mitigation Plans

Ms. Reimer began her planning career preparing [Natural Hazard Mitigation Plans](#) for the cities of Clackamas County, Oregon. She researched hazard event history, created inventories of city assets, and identified vulnerabilities in each city. The plans included community profiles with information on demographics, the local economy, geography and natural features, community organizations, and existing community policies and plans. She recruited steering committees of community leaders in each jurisdiction and facilitated all steering committee meetings. She conducted comprehensive natural risk assessments utilizing local and federal scientific data and reports, then collaborated with community stakeholders to identify risks and develop and prioritize hazard mitigation actions. Finally, she built cross-sector community partnerships to implement future mitigation activities. In total, Ms. Reimer prepared 11 natural hazard mitigation plans, all of which received FEMA approval.

Project Dates: October 2008 – September 2009



City of La Mirada – Housing Element Implementation

Sagecrest is updating the City of La Mirada's Municipal Code and Imperial Highway Specific Plan to implement the policies of the Housing Element to ensure the City is in compliance with State Housing law. Additionally, this project has an extensive public outreach effort, which Sagecrest has created a variety of handouts, social media posts, and information boards to support. Ms. Abrahamian is a crucial team member and works on every aspect of the project, including preparing research and policy recommendations, drafting zoning code amendments, creation of community engagement and educational materials, GIS analysis, and preparation of resolutions and ordinances for adoption of amendments. Ms. Reimer has also contributed to the code amendments and creation of technical assistance materials to aid the implementation of new State housing programs.

Project Dates: July 2024 – Present

City of Riverside – Advance Planning Services

Ms. Reimer has prepared multiple zoning code updates to bring the City of Riverside into compliance with State housing laws. She drafted the code amendment for [two-unit developments](#) and [urban lot splits](#) to comply with Senate Bill 9. She also updated the City's [density bonus ordinance](#) to meet State standards. Ms. Reimer later prepared a Housing Strategy Options Report that detailed six strategies to increase housing production and address the infill development policy goals and objectives outlined in the General Plan. She then prepared [an infill housing ordinance and small lot subdivision ordinance](#) to introduce new housing types within the zoning code.

Project Dates: February 2022 – August 2024

City of San Juan Capistrano – Current Planning Services

Ms. Reimer provides current planning services to the City of San Juan Capistrano. Her projects include the more complex or controversial entitlements, including general plan amendments, specific plan amendments, an SB 330 mixed use project, and projects on historic properties.

Project Dates: January 2024 – Present

City of Brea – Focused General Plan Steering Committee

Ms. Reimer was selected for the City of Brea's [Focused General Plan](#) Steering Committee. The project includes updating the Land Use, Circulation, and Economic Development Elements. It also includes preparation of a new Brea Core Specific Plan. The committee's role is to advise and provide input and perspective to staff, and to review and comment on key elements of the General Plan and the Specific Plan.

Project Dates: June 2024 – Present



5. PROPONENT DESCRIPTION

Founded in 2017, Sagecrest Planning + Environmental (Sagecrest) is an award winning, full service, professional planning firm providing current and advanced planning, development services, and environmental consulting to public agencies and private developers throughout California. Sagecrest is an S-Corporation, in the state of California, solely owned by Amy Vazquez. Sagecrest has not had any litigation, mediation, or arbitration regarding the performance of any services in the past five (5) years.

The Sagecrest Planning + Environmental offices are located at:

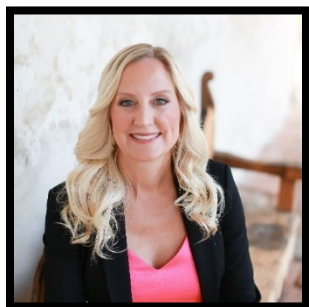
27128 Paseo Espada, Suite 1524
San Juan Capistrano, California 92675
949.996.SAGE (7243)

The contact information for key personnel:

Amy Vazquez, President
Email: avazquez@sagecrestplanning.com
Phone: 714.914.5605

Key Personnel

Sagecrest is comprised of a team of 19 planners and professionals who have experience in general plan updates, preparing ordinances, and policy implementation. The following is the proposed team that will work on the City of Temecula's General Plan Update.



AMY VAZQUEZ, PRESIDENT

Amy has been a professional planner since 1999 and is the Owner and President of Sagecrest Planning + Environmental. She is a practiced planner who has experience working collaboratively with city staff on General Plan Updates and Zoning Code Updates both as a city employee and as a consultant Project Manager. Amy would serve as the representative responsible for all contract matters and negotiations through project completion.



LAUREL REIMER, AICP, PRINCIPAL
714.931.9655

Laurel has worked in the public and private sector since 2008 focusing on entitlements, compliance, and meeting client needs through creative problem solving. She has worked with dozens of jurisdictions throughout the West Coast and has a keen understanding of government procedures, laws, ordinances, and zoning. Laurel served as the Project Manager for the City of Santa Fe Springs Comprehensive General Plan update and Targeted Zoning Code update in 2022. Laurel would serve as the Primary Project Manager.



LEXIE ABRAHAMIAN, AICP, ASSOCIATE PLANNER
949.996.7243

Lexie is a professional planner working with our Planning Services team. Her experience includes advanced planning, regional planning, policy research, GIS, and community engagement and outreach. She earned a Bachelor of Arts degree in Community, Environment & Planning from the University of Washington and a Master of Urban Planning from the University of Southern California. Lexie would provide support to Laurel and serve as the alternate to the Primary Project Manager.



DAN LONG, COMMUNITY LIAISON
949.351.2406

Dan has over 25 years of experience in land-use, land development, vertical construction, and real estate. Prior to working as a developer, Dan was a planner in three southern California cities where he managed entitlements. As a local to the Temecula Valley, Dan has relationships with the local development community and every city in southwest Riverside County. Dan would serve in an advisory role and assist with initial introductions. He would participate as needed in community meetings and with public engagement.

6. EXPERIENCE AND AVAILABILITY

Resumes for Laurel Reimer and Lexie Abrahamian are included in Attachment A.

Ms. Reimer and Ms. Abrahamian are available for the duration of the project. Ms. Reimer would be available for an average of 50% of her time, recognizing that depending on the phase of the Project, full-time commitment could be required. Ms. Reimer would be able to attend frequent daytime and evening meetings in Temecula and can commit to



working at City Hall for two days a week. Ms. Abrahamian is also available to attend daytime and evening meetings in Temecula as additional support.

Ms. Reimer has a strong history of working collaboratively with municipal partners. She currently or previously has worked as a contract planner for five cities in southern California. She has managed several entitlement projects in Orange County and the Inland Empire and works collaboratively with planning departments to submit complete development applications and achieve Planning Commission and City Council approval. Additionally, she has volunteered for numerous civic groups, including the American Planning Association Orange Section Board and the Orange County Transportation Authority Citizen's Advisory Committee.

7. REFERENCES

Sagecrest has served public agencies across California on project management, general plan update management, zoning ordinance preparation, and environmental document preparation and review. Additional references are available upon request.

City of Santa Fe Springs

Ms. Reimer has provided current and advance planning services to the City of Santa Fe Springs since 2016. Projects include the General Plan Update and Targeted Zoning Code Update, Active Transportation Plan, Wireless Telecommunications Facilities Ordinance, and several zoning code amendments.

Wayne Morrell
Director of Planning (retired March 2024)
714.514.2590
Mangoes219@gmail.com

Cuong Nguyen
Community Development Director
562.868.0511
cuongnguyen@santafesprings.org

City of La Mirada

Ms. Abrahamian and Ms. Reimer are currently working with the City of La Mirada to implement their Housing Element.

Manuel Muñoz
Community Development Director
562.943.0131
manuelmunoz@cityoflamirada.org



City of San Juan Capistrano

Ms. Reimer provides current planning services to the City of San Juan Capistrano. Projects include general plan amendments, specific plan amendments, and SB 330 mixed use development.

Paul Garcia
Principal Analyst
949.443.6327
pgarcia@sanjuancapistrano.org

City of Riverside

Ms. Reimer has provided advance planning services to the City of Riverside since 2022. Projects include code amendments to implement SB 9, Density Bonus, and infill housing.

Matthew Taylor
Principal Planner
951.826.5944
MTaylor@riversideca.gov

8. EVIDENCE OF INSURANCE AND CITY BUSINESS LICENSE

Sagecrest has reviewed the City's insurance requirements and will be able to provide the required Certificate of Insurance. Please see Attachment C for evidence of possession of insurance.

Sagecrest currently has a City of Temecula Business License #058419.

9. PRICE

Per Exhibit A of the RPF, a Pricing Form is attached. Please see Attachment B.

10. DISCLOSURES

Sagecrest Planning + Environmental has no conflicts of interest, real or apparent, associated with this project or contracting with the City of Temecula. Sagecrest Planning + Environmental does not request any exceptions to the RFP or the sample contract attached to the RFP.

Sagecrest is solely owned by Amy Vazquez. No current or retired City official or employee, or City official's or employee's immediate family member(s) has ownership interest in Sagecrest. Sagecrest does not currently, nor prospectively, employ any City official or employee.



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ATTACHMENT A – RESUMES



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Laurel Reimer, AICP

Principal

CERTIFICATIONS + SKILLS

- American Institute of Certified Planners (AICP)
- American Planning Association, Former Orange Section Board Member
- Association of Environmental Professionals
- Orange County Transportation Authority, Former Citizens Advisory Committee Member
- Adobe Acrobat
- Microsoft Office

EDUCATION

Master of Urban and Regional Planning

University of California, Irvine

B.A.

Geography/Environmental Studies | Minor, Urban and Regional Studies

University of California, Los Angeles

EXPERIENCE

Sagecrest Planning + Environmental

Principal – Senior Project Manager – Senior Planner | 2017 – Present

- Prepare General Plan and Zoning Code amendments to facilitate development and ensure compliance with State laws.
- Manage complex planning entitlements on behalf of jurisdictions. Analyze projects for code compliance, coordinate interdepartmental review, ensure compliance with CEQA, prepare and present staff reports to Planning Commission and City Council.
- Prepare RFPs/RFQs and serve on review committees.
- Coordinate multidisciplinary teams to help property owners and developers navigate the entitlement and permitting processes for residential, commercial, and industrial projects.
- Research agency ordinances, processes, timelines, and fees to develop due diligence reports, entitlement schedules, and budgets.
- Draft legally defensible CEQA documents, manage preparation of technical studies for entitlement and CEQA review
- Managed City of Santa Fe Springs Comprehensive General Plan and Targeted Zoning Code Update.
- Singlehandedly wrote the wireless telecommunications facilities chapter of the City of Santa Fe Springs municipal code.

Core Development Services

Senior Project Manager – Project Manager – Zoning Manager | 2012 – 2016

- Managed the entitlement processes for telecommunications facilities by researching, interpreting, and applying government laws, codes, ordinances, and regulations.
- Independently launched the Portland, Oregon office and oversaw all Pacific Northwest entitlements and lease negotiations.
- Managed over 300 West Coast projects and four staff members while simultaneously overseeing all aspects of project life cycle.
- Creatively solved problems stemming from changes in codes, public opinion and site violations while considering budgets, scheduling, and client needs.

Clackamas County Emergency Management

Hazard Mitigation Specialist | 2008 – 2009

- Wrote FEMA-approved Natural Hazard Mitigation Plans for 10 cities in Clackamas County, Oregon.
- Identified stakeholders, organized steering committees, and facilitated community meetings.
- Developed comprehensive natural hazard risk assessments.
- Reached consensus by collaborating with the community to prioritize projects.



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Lexie Abrahamian, AICP

Associate Planner

CERTIFICATIONS + SKILLS

- American Institute of Certified Planners (AICP)
- Adobe Acrobat
- Adobe Illustrator
- Adobe InDesign
- Adobe Photoshop
- ArcGIS Pro
- Microsoft Office
- Python
- Spanish – fluent

EDUCATION

B.A. Community, Environment and Planning | Spanish
Summa Cum Laude
University of Washington

Master of Urban and Regional Planning
University of Southern California

EXPERIENCE

Sagecrest Planning + Environmental

Associate Planner | 2024 – Present

- Conducts research on existing zoning codes, identifies potential updates to comply with State law, City General Plan, and City Policies.
- Drafts code revisions that are easy to understand and implement.
- Prepares advanced planning studies and analyses.
- Creates graphics that explain zoning code provisions to be used in municipal codes, handouts, and websites.
- Prepares GIS maps to analyze options for zoning code updates.
- Processes entitlements including variances, CUPs, design review, and wireless telecommunications facilities. Prepares and presents reports to the Planning Commission and City Council.
- Manages plan checks for ADUs, single and multi-family residential developments, and tenant improvements.
- Coordinates with architects and civil engineers for the development of plans to be submitted for entitlements.

Interwest Consulting Group

Assistant Planner – Planning Technician | 2022 – 2024

- Collaborated with project managers to create specific plans, general plans updates, and other advance planning documents.
- Updated a specific plan to accommodate 1400 housing units, a 50-acre regional park, new community/civic spaces, and a mixed-use town center.
- Created a GIS analysis methodology to advise jurisdictions on the siting of emergency shelters in an overlay zone to maintain compliance with State law.
- Wrote policies, development standards, and design guidelines to encourage and streamline development of multi-family residential and mixed-use projects in downtown area specific plans.
- Developed over 20 maps and diagrams and author policies for a comprehensive general plan update.
- Drafted zoning code language for a downtown specific plan to implement the city's housing element and create a transit-oriented development district around a new light rail station.
- Facilitated and prepared graphic materials for 8 community workshops over 3 advance planning efforts.
- Calculated existing and buildout conditions to assist the preparation of cities' general plans and specific plans.



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ATTACHMENT B – COST PROPOSAL

Sagecrest Hourly Breakdown

Tasks	Principal \$210/Hour				Associate Planner \$140/Hour				Community Liaison \$200/Hour				Total
	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	
Task 1. Project Start Up													
Task 1.1: Kickoff Meeting with City Staff	4	1	4	\$ 840.00	4	1	4	\$ 560.00	4	1	4	\$ 800.00	\$ 2,200.00
Task 1.2: Draft Request for Proposals	30	1	30	\$ 6,300.00				\$ -				\$ -	\$ 6,300.00
Task 1.3: Review Proposals	20	1	20	\$ 4,200.00	20	1	20	\$ 2,800.00				\$ -	\$ 7,000.00
Task 1.4: Coordinate Interviews	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.5: Interview Panel	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 1.6: Consultant Selection	4	1	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 1.7: Staff Report	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.8: City Council Meeting	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.9: Kickoff Meeting with City Staff and Consultant	4	1	4	\$ 840.00	4	1	4	\$ 560.00	4	1	4	\$ 800.00	\$ 2,200.00
Task 2. Community Outreach and Engagement				\$ -				\$ -				\$ -	\$ -
Task 2.1: Liaison Role	10	23	230	\$ 48,300.00				\$ -				\$ -	\$ 48,300.00
Task 2.2: Community Engagement Framework	30	1	30	\$ 6,300.00	30	1	30	\$ 4,200.00	4	1	4	\$ 800.00	\$ 11,300.00
Task 2.3: Outreach Toolbox	10	1	10	\$ 2,100.00	30	1	30	\$ 4,200.00				\$ -	\$ 6,300.00
Task 2.4: Master Calendar	10	1	10	\$ 2,100.00	10	1	10	\$ 1,400.00				\$ -	\$ 3,500.00
Task 2.5: Public Point of Contact for the Update	5	23	115	\$ 24,150.00				\$ -				\$ -	\$ 24,150.00
Task 2.6: Final Engagement Summary Report	10	1	10	\$ 2,100.00	5			\$ -				\$ -	\$ 2,100.00
Task 3. Audit of Existing General Plan and Specific Plans	80	1	80	\$ 16,800.00	80	1	80	\$ 11,200.00				\$ -	\$ 28,000.00
Task 4. Existing Conditions Data Collection and Analysis				\$ -				\$ -				\$ -	\$ -
Task 4.1: Best Practices	20	1	20	\$ 4,200.00	80	1	80	\$ 11,200.00				\$ -	\$ 15,400.00
Task 4.2: Existing Conditions Report	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 4.3: Review and Comment on Existing Conditions Deliverables	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 5. Visioning				\$ -				\$ -				\$ -	\$ -
Task 5.1: Liaison Role and Review of Deliverables	10	6	60	\$ 12,600.00				\$ -				\$ -	\$ 12,600.00
Task 5.2: Visioning Meetings	12	4	48	\$ 10,080.00	12	4	48	\$ 6,720.00	5	4	20	\$ 4,000.00	\$ 20,800.00
Task 5.3: Identification of Focus Areas	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 5.4: Issues and Opportunities	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 5.5: Community Atlas and Visioning Document	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 6. Plan Alternatives and Update of General Plan Elements				\$ -				\$ -				\$ -	\$ -
Task 6.1: Land Use Alternatives Report	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 6.2: Urban Design Scenarios	6	4	24	\$ 5,040.00				\$ -				\$ -	\$ 5,040.00
Task 6.3: Selection of Preferred Alternative	4	3	12	\$ 2,520.00				\$ -				\$ -	\$ 2,520.00
Task 6.4: Update of the General Plan Elements	1	4	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 6.5: Review of Deliverables	80	1	80	\$ 16,800.00	20	1	20	\$ 2,800.00				\$ -	\$ 19,600.00
Task 7. Goals, Policies, Programs, and Maps	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 8. Draft General Plan and Revised Specific Plans				\$ -				\$ -				\$ -	\$ -
Task 8.1: Focus Area Urban Design Concepts	2	1	2	\$ 420.00				\$ -				\$ -	\$ 420.00
Task 8.2: Draft General Plan	4	1	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 8.3: Updated Specific Plans	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 8.4: Review of Deliverables	80	2	160	\$ 33,600.00				\$ -				\$ -	\$ 33,600.00
Task 9. Municipal Code and Design Guidelines Update				\$ -				\$ -				\$ -	\$ -
Task 9.1: Zoning Code Consistency Evaluation	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 9.2: Targeted Zoning Code Update	10	3	30	\$ 6,300.00				\$ -				\$ -	\$ 6,300.00
Task 9.3: Citywide Design Guidelines	10	2	20	\$ 4,200.00	10	2	20	\$ 2,800.00				\$ -	\$ 7,000.00
Task 9.4: Review of Deliverables	80	1	80	\$ 16,800.00	60	1	60	\$ 8,400.00				\$ -	\$ 25,200.00
Task 10. Coordination of Program Environmental Impact Report				\$ -				\$ -				\$ -	\$ -
Task 10.1: Data Collection, Scoping, and Internal Communication	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 10.2: Oversee Consultant Team Work Product	10	8	80	\$ 16,800.00				\$ -				\$ -	\$ 16,800.00
Task 10.3: Review and Comment on PEIR Deliverables	40	2	80	\$ 16,800.00				\$ -				\$ -	\$ 16,800.00
Task 10.4: Internal and External Meetings and Public Meetings	6	4	24	\$ 5,040.00				\$ -				\$ -	\$ 5,040.00
Task 11. Special Initiatives	10	6	60	\$ 12,600.00				\$ -				\$ -	\$ 12,600.00
Task 12. Plan Adoption				\$ -				\$ -				\$ -	\$ -
Task 12.1: General Plan Referral	10	1	10	\$ 2,100.00	5	1	5	\$ 700.00				\$ -	\$ 2,800.00
Task 12.2: Planning Commission and City Council	40	1	40	\$ 8,400.00				\$ -				\$ -	\$ 8,400.00
Task 13: Project Management				\$ -				\$ -				\$ -	\$ -
Task 13.1: Consultant Team Contract Administration	6	24	144	\$ 30,240.00				\$ -				\$ -	\$ 30,240.00
Task 13.2: Analyze GPA and Zoning Code Amendment Requests	2	24	48	\$ 10,080.00				\$ -				\$ -	\$ 10,080.00
Task 13.3: Legislative Updates	2	26	52	\$ 10,920.00				\$ -				\$ -	\$ 10,920.00
Task 13.4: Grant Funding and Coordination	4	13	52	\$ 10,920.00				\$ -				\$ -	\$ 10,920.00
Taks 13.4: Administration	5	26	130	\$ 27,300.00				\$ -				\$ -	\$ 27,300.00
Task 13.6: Website Management	3	26	78	\$ 16,380.00				\$ -				\$ -	\$ 16,380.00
Sagecrest Totals			2054	\$ 431,340.00			411	\$ 57,540.00			32	\$ 6,400.00	\$ 495,280.00



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ATTACHMENT C – PROOF OF INSURANCE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/26/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER AssuredPartners Design Professionals Insurance Services, LLC 19689 7th Ave NE, Ste 183, PMB #369 Poulsbo WA 98370 License#: 6003745 SAGEPLA-01	CONTACT NAME: Allison Barga PHONE (A/C No. Ext): 360-626-2007 FAX (A/C, No): 360-626-2007 E-MAIL ADDRESS: allison.barga@assuredpartners.com														
	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Travelers Property Casualty Company of America</td> <td>25674</td> </tr> <tr> <td>INSURER B : Hudson Insurance Company</td> <td>25054</td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Travelers Property Casualty Company of America	25674	INSURER B : Hudson Insurance Company	25054	INSURER C :		INSURER D :		INSURER E :		INSURER F :
INSURER(S) AFFORDING COVERAGE	NAIC #														
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INSURER C :															
INSURER D :															
INSURER E :															
INSURER F :															
INSURED Sagecrest Planning+Environmental 27128 Paseo Espada Suite 1524 San Juan Capistrano CA 92675															

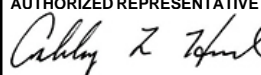
COVERAGES **CERTIFICATE NUMBER:** 377034154 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			6805J742889	6/1/2024	6/1/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BA8R626254	6/1/2024	6/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			UB5J743745	6/1/2024	6/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Professional Liab; Claims Made			PRB0619119014	6/1/2024	6/1/2025	Per Claim \$1,000,000 Aggregate \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER **CANCELLATION**

Proof of Insurance	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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EXHIBIT B

Payment Rates and Schedule

Cost for services shall be as per Consultant's proposal attached hereto and incorporated herein as though set forth in full but in no event shall the total cost of services exceed \$544,808.00 for the total term of the Agreement unless additional payment is approved as provided in the Payment section of this Agreement.

Sagecrest Hourly Breakdown

Tasks	Principal \$210/Hour				Associate Planner \$140/Hour				Community Liaison \$200/Hour				Total
	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	# of Hours (Monthly or Per Task)	Duration (Monthly or Per Task)	Total Hours	Fee	
Task 1. Project Start Up													
Task 1.1: Kickoff Meeting with City Staff	4	1	4	\$ 840.00	4	1	4	\$ 560.00	4	1	4	\$ 800.00	\$ 2,200.00
Task 1.2: Draft Request for Proposals	30	1	30	\$ 6,300.00				\$ -				\$ -	\$ 6,300.00
Task 1.3: Review Proposals	20	1	20	\$ 4,200.00	20	1	20	\$ 2,800.00				\$ -	\$ 7,000.00
Task 1.4: Coordinate Interviews	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.5: Interview Panel	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 1.6: Consultant Selection	4	1	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 1.7: Staff Report	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.8: City Council Meeting	5	1	5	\$ 1,050.00				\$ -				\$ -	\$ 1,050.00
Task 1.9: Kickoff Meeting with City Staff and Consultant	4	1	4	\$ 840.00	4	1	4	\$ 560.00	4	1	4	\$ 800.00	\$ 2,200.00
Task 2. Community Outreach and Engagement				\$ -				\$ -				\$ -	\$ -
Task 2.1: Liaison Role	10	23	230	\$ 48,300.00				\$ -				\$ -	\$ 48,300.00
Task 2.2: Community Engagement Framework	30	1	30	\$ 6,300.00	30	1	30	\$ 4,200.00	4	1	4	\$ 800.00	\$ 11,300.00
Task 2.3: Outreach Toolbox	10	1	10	\$ 2,100.00	30	1	30	\$ 4,200.00				\$ -	\$ 6,300.00
Task 2.4: Master Calendar	10	1	10	\$ 2,100.00	10	1	10	\$ 1,400.00				\$ -	\$ 3,500.00
Task 2.5: Public Point of Contact for the Update	5	23	115	\$ 24,150.00				\$ -				\$ -	\$ 24,150.00
Task 2.6: Final Engagement Summary Report	10	1	10	\$ 2,100.00	5			\$ -				\$ -	\$ 2,100.00
Task 3. Audit of Existing General Plan and Specific Plans	80	1	80	\$ 16,800.00	80	1	80	\$ 11,200.00				\$ -	\$ 28,000.00
Task 4. Existing Conditions Data Collection and Analysis				\$ -				\$ -				\$ -	\$ -
Task 4.1: Best Practices	20	1	20	\$ 4,200.00	80	1	80	\$ 11,200.00				\$ -	\$ 15,400.00
Task 4.2: Existing Conditions Report	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 4.3: Review and Comment on Existing Conditions Deliverables	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 5. Visioning				\$ -				\$ -				\$ -	\$ -
Task 5.1: Liaison Role and Review of Deliverables	10	6	60	\$ 12,600.00				\$ -				\$ -	\$ 12,600.00
Task 5.2: Visioning Meetings	12	4	48	\$ 10,080.00	12	4	48	\$ 6,720.00	5	4	20	\$ 4,000.00	\$ 20,800.00
Task 5.3: Identification of Focus Areas	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 5.4: Issues and Opportunities	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 5.5: Community Atlas and Visioning Document	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 6. Plan Alternatives and Update of General Plan Elements				\$ -				\$ -				\$ -	\$ -
Task 6.1: Land Use Alternatives Report	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 6.2: Urban Design Scenarios	6	4	24	\$ 5,040.00				\$ -				\$ -	\$ 5,040.00
Task 6.3: Selection of Preferred Alternative	4	3	12	\$ 2,520.00				\$ -				\$ -	\$ 2,520.00
Task 6.4: Update of the General Plan Elements	1	4	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 6.5: Review of Deliverables	80	1	80	\$ 16,800.00	20	1	20	\$ 2,800.00				\$ -	\$ 19,600.00
Task 7. Goals, Policies, Programs, and Maps	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 8. Draft General Plan and Revised Specific Plans				\$ -				\$ -				\$ -	\$ -
Task 8.1: Focus Area Urban Design Concepts	2	1	2	\$ 420.00				\$ -				\$ -	\$ 420.00
Task 8.2: Draft General Plan	4	1	4	\$ 840.00				\$ -				\$ -	\$ 840.00
Task 8.3: Updated Specific Plans	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 8.4: Review of Deliverables	80	2	160	\$ 33,600.00				\$ -				\$ -	\$ 33,600.00
Task 9. Municipal Code and Design Guidelines Update				\$ -				\$ -				\$ -	\$ -
Task 9.1: Zoning Code Consistency Evaluation	10	1	10	\$ 2,100.00				\$ -				\$ -	\$ 2,100.00
Task 9.2: Targeted Zoning Code Update	10	3	30	\$ 6,300.00				\$ -				\$ -	\$ 6,300.00
Task 9.3: Citywide Design Guidelines	10	2	20	\$ 4,200.00	10	2	20	\$ 2,800.00				\$ -	\$ 7,000.00
Task 9.4: Review of Deliverables	80	1	80	\$ 16,800.00	60	1	60	\$ 8,400.00				\$ -	\$ 25,200.00
Task 10. Coordination of Program Environmental Impact Report				\$ -				\$ -				\$ -	\$ -
Task 10.1: Data Collection, Scoping, and Internal Communication	20	1	20	\$ 4,200.00				\$ -				\$ -	\$ 4,200.00
Task 10.2: Oversee Consultant Team Work Product	10	8	80	\$ 16,800.00				\$ -				\$ -	\$ 16,800.00
Task 10.3: Review and Comment on PEIR Deliverables	40	2	80	\$ 16,800.00				\$ -				\$ -	\$ 16,800.00
Task 10.4: Internal and External Meetings and Public Meetings	6	4	24	\$ 5,040.00				\$ -				\$ -	\$ 5,040.00
Task 11. Special Initiatives	10	6	60	\$ 12,600.00				\$ -				\$ -	\$ 12,600.00
Task 12. Plan Adoption				\$ -				\$ -				\$ -	\$ -
Task 12.1: General Plan Referral	10	1	10	\$ 2,100.00	5	1	5	\$ 700.00				\$ -	\$ 2,800.00
Task 12.2: Planning Commission and City Council	40	1	40	\$ 8,400.00				\$ -				\$ -	\$ 8,400.00
Task 13: Project Management				\$ -				\$ -				\$ -	\$ -
Task 13.1: Consultant Team Contract Administration	6	24	144	\$ 30,240.00				\$ -				\$ -	\$ 30,240.00
Task 13.2: Analyze GPA and Zoning Code Amendment Requests	2	24	48	\$ 10,080.00				\$ -				\$ -	\$ 10,080.00
Task 13.3: Legislative Updates	2	26	52	\$ 10,920.00				\$ -				\$ -	\$ 10,920.00
Task 13.4: Grant Funding and Coordination	4	13	52	\$ 10,920.00				\$ -				\$ -	\$ 10,920.00
Taks 13.4: Administration	5	26	130	\$ 27,300.00				\$ -				\$ -	\$ 27,300.00
Task 13.6: Website Management	3	26	78	\$ 16,380.00				\$ -				\$ -	\$ 16,380.00
Sagecrest Totals			2054	\$ 431,340.00			411	\$ 57,540.00			32	\$ 6,400.00	\$ 495,280.00