



Western Riverside Council of Governments Administration & Finance Committee

AGENDA

**Wednesday, September 13, 2017
12:00 p.m.**

**County of Riverside
Administrative Center
4080 Lemon Street
5th Floor, Conference Room C
Riverside, CA 92501**

In compliance with the Americans with Disabilities Act and Government Code Section 54954.2, if special assistance is needed to participate in the Administration & Finance Committee meeting, please contact WRCOG at (951) 955-8320. Notification of at least 48 hours prior to meeting time will assist staff in assuring that reasonable arrangements can be made to provide accessibility at the meeting. In compliance with Government Code Section 54957.5, agenda materials distributed within 72 hours prior to the meeting which are public records relating to an open session agenda item will be available for inspection by members of the public prior to the meeting at 4080 Lemon Street, 3rd Floor, Riverside, CA, 92501.

The Administration & Finance Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

- 1. CALL TO ORDER (Debbie Franklin, Chair)**
- 2. PUBLIC COMMENTS**

At this time members of the public can address the Administration & Finance Committee regarding any items listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

- 3. CONSENT CALENDAR**

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

- A. **Summary Minutes from the July 12, 2017, Administration & Finance Committee Meeting are Available for Consideration.** P. 1
- Requested Action:** 1. *Approve the Summary Minutes from the July 12, 2017, Administration & Finance Committee meeting.*
- B. **Finance Department Activities Update Including Agency Audit and Upcoming Annual TUMF Compliance Review by Agencies** P. 5
- Requested Action:** 1. *Receive and file.*
- C. **Financial Report Summary Through July 2017** P. 7
- Requested Action:** 1. *Receive and file.*
- D. **Administration of Additional Property Assessed Clean Energy Programs in the WRCOG Subregion** P. 13
- Requested Actions:** 1. *Recommend to the Executive Committee to adopt WRCOG Resolution Number 41-17; A Resolution of the Executive Committee of the Western Riverside Council of Governments rescinding Resolution Number 14-16 authorizing Renovate America, Inc., to administer and finance eligible improvements to be installed on commercial property and rescinding all approvals and other authorizations granted under such resolution.*
2. *Support the PACE Ad Hoc Committee's recommendation to request that the Executive Committee direct and authorize the Executive Director to enter into contract negotiations and execution of any necessary documents to include Greenworks under WRCOG's PACE umbrella.*
3. *Support the PACE Ad Hoc Committee's recommendation to request that the Executive Committee direct and authorize the Executive Director to enter into contract negotiations and execution of any necessary documents to include Ygrene under WRCOG's PACE umbrella.*
4. **REPORTS / DISCUSSION**
- A. **Request to Allocate Funding to Conduct a Commuting Study Proposal of Riverside County Residents to Focus on Work Trips Outside of the County** P. 21
- Requested Actions:** 1. *Allocate \$250,000 previously identified for an Economic Development initiative to fund a study of Riverside County resident commuting patterns, focusing on work trips which travel outside the County.*
2. *Direct WRCOG to develop a scope of work to complete the study and to coordinate with members, RCTC, RTA, EDA, and other interested partners in the implementation of this study.*

B. Allocation of Funding for Regional Sustainability Demonstration Center Feasibility Study

P. 23

Requested Action: 1. *Recommend that the Executive Committee authorize and direct the Executive Director to enter into a contract agreement with PlaceWorks to perform the EXPERIENCE Feasibility Study in an amount not to exceed \$249,823.*

C. Agency Visioning Session

P. 131

Requested Action: 1. *Discuss and provide direction.*

5. ITEMS FOR FUTURE AGENDAS **Members**

Members are invited to suggest additional items to be brought forward for discussion at future Administration & Finance Committee meetings.

6. GENERAL ANNOUNCEMENTS **Members**

Members are invited to announce items / activities which may be of general interest to the Administration & Finance Committee.

7. NEXT MEETING: The next Administration & Finance Committee meeting is dark in August. The next meeting is scheduled for Wednesday, October 11, 2017, at 12:00 p.m., in the County of Riverside Administrative Center, 5th Floor, Conference Room C.

8. ADJOURNMENT

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1. CALL TO ORDER

The meeting of the Administration & Finance Committee (Committee) was called to order at 12:04 p.m. by Chairwoman Debbie Franklin, at the County of Riverside Administrative Center, 5th Floor, Conference Room C.

Members present:

Debbie Franklin, City of Banning
Eugene Montanez, City of Corona
Bonnie Wright, City of Hemet
Laura Roughton, City of Jurupa Valley
Brian Tisdale, City of Lake Elsinore
Kelly Seyarto, City of Murrieta
Mike Naggar, City of Temecula (12:12 p.m. arrival)
Ben Benoit, City of Wildomar (Chair)
Chuck Washington, County of Riverside District 3
Marion Ashley, County of Riverside District 5
Brenda Dennstedt, Western Municipal Water District (12:22 p.m. arrival)

Staff present:

Steve DeBaun, Legal Counsel, Best Best & Krieger
Ernie Reyna, Chief Financial Officer
Barbara Spoonhour, Director of Energy and Environmental Programs
Jennifer Ward, Director of Government Relations
Tyler Masters, Program Manager
Andrew Ruiz, Program Manager
Crystal Adams, Program Manager
Chris Tzeng, Program Manager
Daniel Ramirez-Cornejo, Staff Analyst
Cynthia Mejia, Staff Analyst
Janis Leonard, Administrative Services Manager

Guests present:

Ryan Baron, Best Best & Krieger
Jeff Fuller, The Energy Authority
David Dazlich, Building Industry Association
Justin Lawler, The Creative Bar
Brittany Philippi, The Creative Bar

2. PUBLIC COMMENTS

There were no public comments.

3. CONSENT CALENDAR – (Seyarto/Ashley) 9 yes; 0 no; 0 abstention. Items 3.A through 3.G were approved by a unanimous vote of those members present. Item numbers 3.E and 3.F were pulled for discussion. The City of Temecula and the Western Municipal Water District were not present.

- A. Summary Minutes from the June 14, 2017, Administration & Finance Committee meeting are available for consideration.**

Action: 1. *Approved the Summary Minutes of the June 14, 2017, Administration & Finance Committee meeting.*

B. Finance Department Activities Update

Action: 1. *Received report.*

C. Financial Report Summary through May 2017

Action: 1. *Received report.*

D. Single Signature Authority Report

Action: 1. *Received report.*

E. 4th Quarter draft Budget Amendment for Fiscal Year 2016/2017

Ernie Reyna reported that for Fiscal Year (FY) 2016/2017, the WRCOG PACE Program revenues were budgeted at \$1.9 million, and actual revenues came in at \$1.2 million. This is a difference of approximately \$700k. The statewide PACE Program experienced a similar decline in revenues. While originally projected to be \$7.6 million, actual revenues were \$5.8 million. This is a difference of approximately \$1.8 million. Between the two Programs, total revenues are approximately \$2.5 million less than projected.

Potential reasons for the decline could be that there are more PACE providers, market saturation, fewer projects, and/or other financing options available to consumers.

This decline does not affect either Program. The amount of \$4 million in carryover revenues for FY 2016/2017 has taken into account the decline of projected revenues.

Barbara Spoonhour clarified that when the FY 2016/2017 Agency budget was prepared, staff anticipated carryover revenues to be approximately \$6 million. However, the actual carryover amount has been determined to be approximately \$4 million. This decline does not affect the Program.

Action: 1. *Recommended that the Executive Committee approve the 4th Quarter draft Budget amendment for Fiscal Year 2016/2017.*

(Seyarto/Ashley) 9 yes; 0 no; 0 abstention. Item 3.E was approved by a unanimous vote of those members present. The City of Temecula and the Western Municipal Water District were not present.

F. Approval of Professional Services and Contractor Agreement with Exigent Systems to provide IT technical support

Ernie Reyna reported that in order to expand Agency IT services, WRCOG located a firm that employs staff with various areas of expertise. The proposed firm will also assist WRCOG in its upcoming office move.

Action: 1. *Recommended that the Executive Committee approve the Professional Services Agreement between the Western Riverside Council of Governments and Exigent Systems, to provide Information Technology (support services for the Agency in an amount not to exceed \$120,000 for Fiscal Year 2017/2018.*

(Tisdale/Benoit) 9 yes; 0 no; 0 abstention. Item 3.F was approved by a unanimous vote of those members present. The City of Temecula and the Western Municipal Water District were not present.

G. On-Call Planning Professional Services

Action: 1. *Received report.*

4. REPORTS / DISCUSSION (Note: Items were taken out of order)

A. Community Choice Aggregation Program Activities Update

Barbara Spoonhour reported that the draft Joint Powers Agreement (JPA) and Bylaws being presented today will also be provide to the Technical Advisory Committee for review and comment. Staff transmitted a list of comments and responses to this Committee earlier this week.

The JPA was prepared to be broad in order to allow flexibility for the JPA to offer the Community Choice Aggregation (CCA) Board the opportunity to fine tune it.

The initial agreement does not distinguish between initial participants and those which join later. There is no cost for participants to join; however, language regarding member dues are included in the event the CCA Board desires to do so.

The JPA provides that an exiting member can wait out the contractual terms so that there are no remaining liabilities. Members are allowed by law to not take on the obligations and liabilities of the JPA unless they voluntarily assume those obligations and liabilities.

The administration agreement between WRCOG and the CCA is proposed for three years, which would allow sufficient time for the CCA to get up and running. That time-frame is negotiable.

WRCOG's Executive Director would serve as the CCA's Executive Director under the proposed JPA until the CCA hires its own staff.

The proposed Bylaws provides for flexibility and a general outline of the powers and procedures of the JPA; the CCA Board has the ability to narrow the powers and procedures.

Staff is recommending The Creative Bar as the consultant for outreach and marketing of the CCA. The Creative Bar will host several interactive sessions with staff and member jurisdictions. Phase one includes brand development; phase two includes marketing strategy; and phase three includes creative deployment of the CCA.

WRCOG partnered with the Coachella Valley Association of Governments and released a Request for Proposals for CCA operational assistance. Six firms were interviewed, and staff is recommending The Energy Authority to perform operational assistance.

Jeff Fuller of The Energy Authority reported that his company partners exclusively with state / municipal agencies. LEAN Energy is a sub-consultant of The Energy Authority and deals with project management, implementation of services, governance structure, etc. Calpine handles data management, a call center, billing, etc.

The Energy Authority is proposing a deferral of consulting costs and other fees / expenses until the CCA launches.

Ms. Spoonhour indicated that staff will be reaching out to member jurisdictions to present information at either study sessions or Council / Board meetings.

Actions: 1. *Recommended that staff send the entire list of comments and responses to all member jurisdictions.*
 2. *Recommended that the Executive Committee approve the CCA Joint Powers Agreement and Bylaws.*

3. *Recommended that the Executive Committee approve the draft agreement between WRCOG and the CCA for staffing services.*
4. *Recommended that the Executive Committee direct and authorize the Executive Director to negotiate and enter into an agreement with The Energy Authority and EES Consulting to provide CCAC operational services.*
5. *Authorized and directed the Executive Director to enter into an agreement, substantially as to form, not to exceed \$100,000 with The Creative Bar for branding and marketing services.*

(Montanez/Seyarto) 10 yes; 0 no; 0 abstention. Item 4.A was approved by a unanimous vote of those members present.

B. Administration of additional PACE Programs in the WRCCOG subregion

Crystal Adams reported that the PACE Programs Ad Hoc Committee met with PACE Funding on June 14, 2017, and WRCOG staff conducted a site visit on June 26, 2017.

PACE Funding has funded 231 projects totaling nearly \$10 million. PACE Funding is unique in that it records two calls with a property owner; one at the time of application and one at the time of project completion.

PACE Funding inspects a contractor's first three projects, as well as 5% of all future projects. PACE Funding currently works with 10 contractors within Riverside County, with additional contractors on retainer.

- Action:**
1. *Supported the PACE Ad Hoc Committee's recommendation to request that the Executive Committee direct and authorize the Executive Director to enter into contract negotiations and execution of any necessary documents to include PACE Funding under WRCOG's PACE umbrella.*

(Benoit/Roughton) 10 yes; 0 no; 0 abstention. Item 4.B was approved by a unanimous vote of those members present. The Western Municipal Water District was not present.

5. ITEMS FOR FUTURE AGENDAS

There were no items for future agendas.

6. GENERAL ANNOUNCEMENTS

There were no general announcements.

7. CLOSED SESSION

There were no reportable actions.

- 8. NEXT MEETING:** **The next Administration & Finance Committee meeting is scheduled for Wednesday, September 13, 2017, at 12:00 p.m., in the Riverside County Administrative Center, 5th Floor, Conference Room C.**

- 9. ADJOURNMENT:** **The meeting of the Administration & Finance Committee adjourned from Closed Session at 1:25 p.m.**



Western Riverside Council of Governments

Administration & Finance Committee

Staff Report

Subject: Finance Department Activities Update Including Agency Audit and Upcoming Annual TUMF Compliance Review by Agencies

Contact: Ernie Reyna, Chief Financial Officer, ereyna@wrcog.us, (951) 955-8432

Date: September 13, 2017

The purpose of this item is to provide an update on the financial audit of Fiscal Year (FY) 2016/2017, 1st Quarter Budget Amendments for FY 2017/2018, and the upcoming annual TUMF compliance review for FY 2016/2017.

Requested Action:

1. Receive and file.

FY 2016/2017 Financial Audit

Auditors from Rogers, Anderson, Malody, & Scott (RAMS) have concluded the interim portion of the financial audit for the Agency. Included in the fieldwork was the review of payroll, accounts payable, and all other areas of WRCOG's accounting system. The final Comprehensive Annual Financial Report is expected to be issued no later than November 15, 2017, and will be reviewed by the Finance Directors' Committee at its quarterly meeting on October 26, 2017. It will then be presented at the November 8, 2017, Administration & Finance Committee meeting, with the Executive Committee scheduled to receive the report at its December 4, 2017, meeting.

Budget Amendment

September 30, 2017, will mark the end of the first quarter and FY 2017/2018, and the Administration & Finance Committee will be presented with an amendment report at its October 11, 2017, meeting. It is anticipated that the Executive Committee will consider the report at its November 6, 2017, meeting.

Annual TUMF Review of Participating Agencies

WRCOG is contacting member agency staff to schedule reviews of TUMF activities for FY 2016/2017. The reviews provide WRCOG an opportunity to meet with staff that are assigned to TUMF, including planning, public works, and finance staff. During the review, WRCOG will randomly select remittance reports to review and verify that the correct land use type has been used and that fees have been calculated properly. The review is expected to be completed by December 2017, with reports being issued to City Managers and Agency heads around January 2018.

Prior Action:

August 17, 2017: The Technical Advisory Committee received report.

Fiscal Impact:

This item is informational only; therefore, there is no fiscal impact.

Attachment:

None.



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: Financial Report Summary Through July 2017

Contact: Ernie Reyna, Chief Financial Officer, ereyna@wrcog.us, (951) 955-8432

Date: September 13, 2017

The purpose of this item is to provide a monthly summary of WRCOG's financial statements in the form of combined Agency revenues and costs.

Requested Action:

1. Receive and file.

Attached for Administration & Finance Committee review is the Agency Financial Report summary through July 2017.

Prior Action:

August 17, 2017: The Technical Advisory Committee received report.

Fiscal Impact:

This item is informational only; therefore there is no fiscal impact.

Attachment:

1. Financial Report summary – July 2017.

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Item 3.C

Financial Report Summary Through
June 2017

Attachment 1

Financial Report summary –
June 2017

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Western Riverside Council of Governments
Monthly Budget to Actuals
For the Month Ending July 31, 2017

	Approved 6/30/2018 Budget	Thru 7/31/2017 Actual	Remaining 6/30/2018 Budget
Revenues			
WRCOG HERO Residential Revenue	816,771	169,958	646,813
CA HERO Residential Revenue	7,639,575	399,042	7,240,533
WRCOG HERO Residential Recording Revenue	182,775	35,035	147,740
CA HERO Residential Recording Revenue	1,508,036	62,315	1,445,721
CA First Residential Revenue	167,000	3,758	163,242
CA First Residential Recording Revenue	86,000	1,377	84,623
Other Misc Revenue	-	5,657	(5,657)
RIVTAM Revenue	-	25,000	(25,000)
Total Revenues	62,996,435	702,141	62,294,294
Expenditures			
Wages & Salaries	2,584,095	24,617	2,559,477
Fringe Benefits	739,956	209,210	530,746
Total Wages and Benefits	3,384,051	233,827	3,150,224
Overhead Allocation	2,219,371	184,948	2,034,423
Commissioners Per Diem	62,500	1,800	60,700
Office Lease	427,060	11,437	415,623
Parking Validations	4,775	400	4,375
Event Support	112,600	500	112,100
Rent/Lease Equipment	35,000	427	34,573
Membership Dues	31,950	356	31,594
Meeting Support/Services	12,100	61	12,039
Postage	8,155	402	7,753
Other Household Expenditures	4,880	349	4,531
Storage	1,000	2,550	(1,550)
Communications-Regular	1,000	76	924
Communications-Long Distance	500	19	481
Equipment Maintenance - General	11,000	3,116	7,884
Insurance - General/Business Liason	72,950	24,795	48,155
PACE Recording Fees	1,862,811	36,439	1,826,372
Seminars/Conferences	24,550	70	24,480
Travel - Mileage Reimbursement	15,700	223	15,477
Other Incidentals	13,358	1,647	11,711
Consulting Labor	3,659,928	6,209	3,653,719
Consulting Expenses	72,865	33,966	38,899
Office Furniture Purchases	315,000	688	314,312
Total General Operations	61,181,206	310,478	60,870,728
Total Expenditures	64,565,257	544,305	64,020,951

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Western Riverside Council of Governments

Administration & Finance Committee

Staff Report

Subject: Administration of Additional Property Assessed Clean Energy Programs in the WRCOG Subregion

Contact: Casey Dailey, Director of Energy and Environmental Programs, cdailey@wrcog.us, (951) 955-7282

Date: September 13, 2017

The purpose of this item is to provide the Committee with an update on additional PACE Programs that have an interest in operating under WRCOG's PACE "umbrella." On June 6, 2016, the Executive Committee established a PACE Ad Hoc Committee to review and administer the vetting process and provide recommendations on the possible inclusion of additional PACE providers under the WRCOG umbrella for the subregion.

Requested Actions:

1. Recommend to the Executive Committee to adopt WRCOG Resolution 41-17 to rescind WRCOG Resolution 14-16 to rescind the authorization for Renovate America, Inc., to administer the Commercial HERO Program and to remove the HERO Commercial Program from the Program Report and Handbook.
2. Support the PACE Ad Hoc Committee's recommendation to request that the Executive Committee direct and authorize the Executive Director to enter into contract negotiations and execution of any necessary documents to include Greenworks to administer a commercial PACE program under WRCOG's PACE umbrella.
3. Support the PACE Ad Hoc Committee's recommendation to request that the Executive Committee direct and authorize the Executive Director to enter into contract negotiations and execution of any necessary documents to include Ygrene under WRCOG's PACE umbrella.

Rescinding WRCOG Resolution Number 14-16

In June 2016, the Executive Committee adopted Resolution Number 14-16 to have Renovate America implement the HERO Commercial PACE Program. As part of Renovate America's Program, Greenworks would provide underwriting services. However, during the development process it has come to WRCOG's attention that Renovate America is not moving forward with developing a HERO Commercial Program. Due to the desire to have additional commercial PACE Programs in the subregion and in the statewide CA HERO Program, staff reached out to Greenworks to seek its interest in coming under WRCOG's PACE umbrella (discussed below).

The administrative action of rescinding WRCOG Resolution Number 14-16 via WRCOG Resolution Number 41-17 (Attachment 1) would rescind the authorization for Renovate America, Inc., to administer the Commercial HERO Program and remove the HERO Commercial Program references from the Program Report and Program Handbook and allow WRCOG to move forward with working with Greenworks Lending.

Additional PACE Providers in the WRCOG Subregion

In mid-June 2016, WRCOG staff distributed a solicitation to PACE providers to provide an opportunity for them, if interested, to operate their Program in the WRCOG subregion under the WRCOG PACE “umbrella.” Under this structure, WRCOG would serve as the bond issuer. WRCOG would then retain the oversight of the Program and be responsible for Program management, ensuring the application of consistent consumer protections among these Programs throughout the subregion, for example, and recording the assessments on the property.

On June 6, 2016, the Executive Committee established a PACE Ad Hoc Committee to review and complete the vetting process and provide recommendations on the possible inclusion of additional PACE providers under the WRCOG “umbrella” for the subregion. The Ad Hoc Committee consists of representation from the Cities of Banning, Jurupa Valley, Lake Elsinore, and Wildomar, with assistance from WRCOG staff and WRCOG’s Bond Counsel (Best Best & Krieger).

To date, the Executive Committee has approved CaliforniaFIRST, Spruce, and PACE Funding to operate under the WRCOG PACE umbrella.

On September 6, 2017, the Ad Hoc Committee met with both Greenworks and Ygrene to seek additional information regarding their respective Programs and to learn how the interaction between the provider and WRCOG would occur. Based on the information received from the providers and their respective interviews with the Ad Hoc Committee, staff is asking this Committee to forward its support of the Ad Hoc Committee’s recommendation to bring Greenworks under the WRCOG’s PACE umbrella for both the Energy Efficiency and Water Conservation Program for Western Riverside County (the “Western Riverside County Program”) and the California HERO Program and Ygrene under WRCOG’s PACE umbrella for the Western Riverside County Program for residential PACE to the Executive Committee at its October meeting.

The following is an overview of general information on each of the Providers:

- **Greenworks**: Based in Darien, Connecticut, and offers only a commercial PACE Program. Greenworks’ leadership team authored Connecticut’s PACE legislation and advised legislators and state agencies on the design of PACE Programs in over 10 states resulting in nearly 75% of all CPACE transactions nationally. To date, Greenworks has completed a total of 75 commercial projects for over \$37 million nationwide. With the adoption of 41-17 to remove the references of HERO Commercial from the Program Report and the Program Handbooks, staff recommends utilizing Greenworks in both the regional and statewide programs.
- **Ygrene**: Based in Petaluma, has over 300 employees, and offers both a commercial and residential PACE Program. To date, Ygrene is approved to provide PACE financing in more than 400 cities and counties and has processed over \$2.5 billion in applications for more than 43,000 properties. The interest rates and fees being charged by the Program are in line with other Providers. Ygrene already adheres to the PACE Consumer Protection Policies that the Executive Committee adopted in December 2015. WRCOG staff conducted a site visit on August 29, 2017, to learn more about Ygrene’s operations, contractor management, and processes.

What are the Next Steps for the Member Agencies?

Member jurisdictions will always retain the right to include or exclude additional PACE providers who are not participating under the WRCOG PACE umbrella.

If the Executive Committee’s action is to adopt Greenworks and/or Ygrene as an additional provider, the Program will be automatically able to operate in each member jurisdiction, unless a jurisdiction takes action to prohibit their inclusion. If a jurisdiction desires NOT to include either Greenworks and/or Ygrene as an additional provider, it must adopt a resolution to opt out of the Program; a resolution template can be provided to the jurisdiction upon request.

Prior Actions:

August 17, 2017:

The Technical Advisory Committee received report.

August 8, 2017:

The WRCOG Executive Committee 1) authorized the Executive Director to amend the WRCOG HERO Program Report, the WRCOG HERO Program Handbook, and the California HERO Program Handbook to reflect the underwriting criteria change to lower the maximum combined loan to value limit to 97% and remove the minimum equity threshold; 2) adopted WRCOG Resolution Number 38-17; A Resolution of the Executive Committee of the Western Riverside Council of Governments making certain representations and authorizing the placement of assessments on the tax roll in Shasta County; 3) conducted a Public Hearing regarding the inclusion of the City of Santa Rosa; 4) adopted WRCOG Resolution Number 36-17; A Resolution of the Executive Committee of the Western Riverside Council of Governments confirming modification of the California HERO Program Report so as to expand the Program area within which contractual assessments may be offered; 5) accept the County of Tulare Unincorporated areas as an Associate Member of the Western Riverside Council of Governments; 6) adopted WRCOG Resolution Number 37-17; A Resolution of the Executive Committee of the Western Riverside Council of Governments declaring its intention to modify the California HERO Program Report so as to increase the Program area within which contractual assessments may be offered and setting a Public Hearing thereon; 7) supported the Administration & Finance Committee's recommendation to direct and authorize the Executive Director to enter into contract negotiations and execute any necessary documents to include PACE Funding under WRCOG's PACE umbrella.

Fiscal Impact:

PACE revenues and expenditures are allocated in the Fiscal Year 2017/2018 Budget and are broken out by the various PACE providers under the Energy Department.

Attachment:

1. WRCOG Resolution Number 41-17; A Resolution of the Executive Committee of the Western Riverside Council of Governments rescinding Resolution Number 14-16 authorizing Renovate America, Inc., to administer and finance eligible improvements to be installed on commercial property and rescinding all approvals and other authorizations granted under such resolution.

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Item 3.D

Administration of Additional Property
Assessed Clean Energy Programs in the
WRCOG Subregion

Attachment 1

WRCOG Resolution Number 41-17; A
Resolution of the Executive Committee of
the Western Riverside Council of
Governments rescinding Resolution
Number 14-16 authorizing Renovate
America, Inc., to administer and finance
eligible improvements to be installed on
commercial property and rescinding all
approvals and other authorizations
granted under such resolution

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Western Riverside Council of Governments

County of Riverside • City of Banning • City of Beaumont • City of Calimesa • City of Canyon Lake • City of Corona • City of Eastvale • City of Hemet
City of Jurupa Valley • City of Lake Elsinore • City of Menifee • City of Moreno Valley • City of Murrieta • City of Norco • City of Perris • City of Riverside
City of San Jacinto • City of Temecula • City of Wildomar • Eastern Municipal Water District • Western Municipal Water District • Morongo Band of Mission
Indians • Riverside County Superintendent of Schools

RESOLUTION NUMBER 41-17

A RESOLUTION OF THE EXECUTIVE COMMITTEE OF THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS RESCINDING RESOLUTION NUMBER 14-16 AUTHORIZING RENOVATE AMERICA, INC., TO ADMINISTER AND FINANCE ELIGIBLE IMPROVEMENTS TO BE INSTALLED ON COMMERCIAL PROPERTY AND RESCINDING ALL APPROVALS AND OTHER AUTHORIZATIONS GRANTED UNDER SUCH RESOLUTION

WHEREAS, the Executive Committee of the Western Riverside Council of Governments ("WRCOG"), acting upon the offer and request of Renovate America, Inc., adopted Resolution Number 14-16 on June 6, 2016, authorizing Renovate America, Inc., to administer and finance the installation of improvements eligible under Chapter 29 of the Improvement Bond Act of 1911, being Division 7 of the California Streets and Highways Code ("Chapter 29") on commercial properties and, in connection with and in order to implement such authorization for both the Energy Efficiency and Water Conservation Program for Western Riverside County and the California HERO Program (together, the "Programs"), approved amendments to the Program Report for both the Programs and the forms of commercial handbook, commercial application, assessment contract, master indenture, administration agreement and master bond purchase agreement and authorized the issuance of limited obligation improvements bonds to finance the installation of such improvements (together with all other approvals and authorizations set forth in Resolution Number 14-16, the "Approvals and Authorizations"); and

WHEREAS, Renovate America, Inc., has now notified WRCOG that it no longer intends to administer and finance the installation of improvements on commercial properties and intends to concentrate its efforts on the residential HERO program; and

WHEREAS, the Executive Committee desires to rescind Resolution Number 14-16 and the Approvals and Authorization.

NOW, THEREFORE, BE IT RESOLVED, by the Executive Committee of the Western Riverside Council of Governments as follows:

Section 1. Rescission of Resolution Number 14-16 and All Approvals and Authorizations Thereunder. The Executive Committee hereby rescinds Resolution Number 14-16 and such resolution shall upon becoming effective have no further legal force or effect.

The Executive Committee, by the rescission of Resolution Number 14-16, further rescinds any and all Approvals and Authorizations as set forth in Resolution Number 14-16 and such Approvals and Authorizations, and each of them, shall have no further legal force or effect.

Section 2. Additional Action. The Executive Director is hereby authorized and directed to take such actions or cause such actions to be taken as are necessary in the judgement of the Executive Director to conform the Program Reports and any other documents to the actions taken by the adoption of this Resolution.

Section 3. Effective Date. This Resolution shall take effect upon its adoption and Resolution Number 14-16 and all Approvals and Authorizations shall be deemed to be rescinded upon this Resolution taking effect.

PASSED AND ADOPTED at a Meeting of the Executive Committee of the Western Riverside Council of Governments on October 2, 2017.

Debbie Franklin, Chair
WRCOG Executive Committee

Rick Bishop, Secretary
WRCOG Executive Committee

Approved as to form:

Best Best & Krieger, LLP
WRCOG Bond Counsel

AYES: _____ NAYS: _____ ABSENT: _____ ABSTAIN: _____



Western Riverside Council of Governments

Administration & Finance Committee

Staff Report

Subject: Request to Allocate Funding to Conduct a Commuting Study Proposal of Riverside County Residents to Focus on Work Trips Outside of the County

Contact: Chris Gray, Director of Transportation, cgray@wrcog.us, (951) 955-8304

Date: September 13, 2017

The purpose of this item is to discuss the allocation of Economic Development funds to a study of Riverside County commuting patterns. This study will identify specific locations and businesses which Riverside County residents travel to for work outside of Riverside County on a regular basis. These businesses can then be targeted by EDA and other agencies to potentially expand or relocate within Riverside County. This study can also inform other economic development initiatives to reduce the level of commute trips which leave Riverside County on a regular basis.

Requested Actions:

1. Allocate \$250,000 previously identified for an Economic Development initiative to fund a study of Riverside County resident commuting patterns, focusing on work trips which travel outside the County.
2. Direct WRCOG to develop a scope of work to complete the study and to coordinate with members, RCTC, RTA, EDA, and other interested partners in the implementation of this study.

Background

In 2016, through various discussions by the Agency Carryover Funds Ad Hoc Committee, Administration & Finance Committee, and Executive Committee, \$250,000 of the Fiscal Year 2015/2016 Agency carryover funds were identified for desired use on an economic development initiative. The purpose of the initiative, as it was discussed, is to address challenges associated with attracting economic development opportunities to the subregion.

In February 2017, representatives from the University of California, Riverside (UCR), Center for Economic Forecasting and Development provided a presentation to the Administration & Finance Committee proposing an economic development vitality report to collect and analyze critical data at both the subregional and local levels for the purpose of informing the future development of the Initiative. The proposed report would be an expansion of a study UCR is performing on behalf of the Riverside County Economic Development Agency (EDA), and includes accessing sensitive, market-specific data provided by the State. At that meeting, the Committee directed staff to continue discussions of potential projects with economic development staff from local jurisdictions, UCR, and EDA.

In May 2017, EDA, UCR, WRCOG, and member jurisdiction economic development stakeholders convened to discuss economic development, focusing on the proposed vitality report. At the August 17, 2017, Technical Advisory Committee (TAC) meeting, Carrie Harmon, EDA Deputy Director, provided an overview of EDA's available services and resources to ensure WRCOG's efforts are not duplicating existing work.

Potential Next Steps & Direction for Staff

To further discussion on WRCOG's Economic Development Initiative and generally explore WRCOG's role in regional economic development efforts, staff evaluated four potential options on how to effectively use the \$250,000 set-aside, which include (presented in no particular order of preference):

1. **Regional Branding & Marketing**: This effort would attempt to develop a unique brand for Western Riverside County and use this brand to market potential businesses with tailored attraction and retention strategies.
2. **Regional Economic Baseline**: UCR would develop a detailed economic data set for each City using confidential data provided by the California Economic Development Department. This data set would inform member agencies on current conditions and near-term trends. Member agencies could use this information to tailor future economic development strategies and have a benchmark to evaluate the effectiveness of these strategies.
3. **Regional Commuting Study**: This effort would conduct a comprehensive survey of Riverside County residents commuting out of Riverside County to work in Orange, San Bernardino, San Diego, and Los Angeles Counties. A key aspect of this study would be the evaluation of types of industries and specific businesses where these employees are leaving the region to work, who could then be targeted to relocate into Riverside County to reduce the amount of workers "exported" out to these adjacent Counties.
4. **Economic Development Best Practices Workbook**: As part of this study, WRCOG would compile a workbook of Best Practices suitable for the region, which member agencies would then use to facilitate development as they saw fit. This effort would also require a significant outreach effort to verify that none of the anticipated strategies are currently being implemented.

These four options were presented to the TAC on August 17, 2017, and there was an overwhelming preference for Option #3. This option is also strongly supported by RCTC, RTA, EDA, and other regional partners. A meeting of Economic Development staff from local jurisdictions on September 6, 2017, also recommended that WRCOG prioritize this approach.

Staff will provide a presentation to the Administration & Finance Committee on the components and desired outcomes of this study, and is seeking input and a recommendation from the Committee to move forward.

Prior Action:

August 17, 2017: The Technical Advisory Committee recommended that WRCOG allocate funding from the Economic Development initiative to the proposed Commuting Study.

Fiscal Impact:

Funding for the Economic Development Initiative has been programmed accordingly under the Fiscal Year 2017/2018 Agency Budget, in the General Fund. The \$250,000 will be transferred to the Transportation Department as part of the 1st Quarter Budget Amendment for Fiscal Year 2017/2018.

Attachment:

None.



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: Allocation of Funding for Regional Sustainability Demonstration Center Feasibility Study

Contact: Jennifer Ward, Director of Government Relations, jward@wrcog.us, (951) 955-0186

Date: September 13, 2017

The purpose of this item is to provide an update on planning efforts for a potential sustainability demonstration center, EXPERIENCE, to promote sustainable practices and showcase the assets and capabilities of the subregion, and to request a recommendation for WRCOG to enter into an agreement with PlaceWorks consulting to perform a feasibility analysis for EXPERIENCE.

Requested Action:

1. Recommend that the Executive Committee authorize and direct the Executive Director to enter into a contract agreement with PlaceWorks to perform the EXPERIENCE Feasibility Study in an amount not to exceed \$249,823.

Background

Western Riverside County is one of the fastest growing subregions in the State of California and the United States. Subregional leaders identified six interrelated components critically important to achieving a premier quality of life in Western Riverside County and incorporated these into the WRCOG Economic Development & Sustainability Framework (the Framework), which serves as a guide to grow strategically and achieve a vibrant and livable community. The six Framework goal areas pertain to 1) Economic Development, 2) Water and Wastewater, 3) Education, 4) Health, 5) Transportation, and 6) Energy and the Environment.

In August 2016, staff introduced the Administration & Finance Committee to the concept of EXPERIENCE, envisioned as a vibrant regional center with a variety of visitor attractions that would also serve as a sustainability demonstration center. The intent of EXPERIENCE is to showcase the strides inland southern California has made towards achieving a more sustainable quality of life, and to empower visitors to institute more sustainable practices into their homes, schools, and businesses. Though EXPERIENCE would be showcasing sustainable best practices, the center would be designed to draw audiences for a variety of purposes by including such elements as an education center, community farm, water efficient garden, walking loop, amphitheater, farm-to-fork café, and other public assets. EXPERIENCE would borrow inspiration from similar concepts from across the globe including:

- The Frontier Project – Rancho Cucamonga, CA
- Southern California Edison Energy Education Center – Irwindale, CA
- David Brower Center – Berkeley, CA
- Alliance Center – Denver, CO

Partnerships

In January, 2017, staff returned to the Committee with a call for interested partners for EXPERIENCE, which was also distributed among the agency's broader network. Staff ultimately consulted with representatives from

the following interested agencies: the Cities of Perris, Riverside, and Temecula; Eastern Municipal Water District (EMWD); Western Municipal Water District (WMWD); Riverside Corona Resource Conservation District (RCRCD); Riverside County Flood Control and Water Conservation District (Flood Control); and Southern California Edison (SCE). EMWD, in partnership with the City of Perris, is committed to moving forward to develop a water-wise demonstration center in its headquarter offices in Perris and is interested in partnering with WRCOG to include additional concepts from EXPERIENCE. The Cities of Riverside and Temecula expressed interest in continuing discussions with WRCOG regarding EXPERIENCE, and have identified potential, but not concrete, sites for the center. WMWD expressed interest in siting EXPERIENCE. RCRCD, Flood Control, and SCE expressed interest in providing support for EXPERIENCE as the idea evolves.

Financing

In 2016, an Agency Carryover Funds Ad Hoc Committee was established to discuss the allocation of the remaining \$1.1 million of Fiscal Year 2015/2016 Agency carryover funds. The Ad Hoc Committee met on August 22, 2016, and the discussion resulted in the following recommendation: allocate \$250,000 towards a comprehensive, regional economic development initiative for Western Riverside County, and allocate the remaining \$850,000 to Agency Reserves, with the caveat that some of these funds could be applied towards EXPERIENCE. The proposed allocation was considered by the Administration & Finance Committee on October 12, 2016, but tabled for a future discussion. The purpose of this item today is to request that a portion of this remaining funds be allocated to a Feasibility Study to determine how a regional Sustainability Center might be implemented.

Feasibility Analysis

In March 2017, WRCOG released a Request for Proposals for a suite of on-call consulting services. Among the proposal categories was "Economic and Demographic Forecasting" which included an EXPERIENCE Feasibility task. Three firms (AECOM, PlaceWorks, and Michael Baker) submitted for the category and, upon review by staff and representatives from both the Planning Directors' and Public Works Committees, were each found to have met the minimum criteria to serve on the bench of consultants for the on-call planning category. Staff then reviewed each proposal and determined, factoring in the scope of work proposed, familiarity with the region and agency, price, credentials of the identified PlaceWorks staff and relevant experience, PlaceWorks presented the most competitive proposal for the task of performing a feasibility analysis. The complete PlaceWorks proposal is included as an attachment to this staff report; the EXPERIENCE task can be found on page 24 of the attachment. As identified in the attachment, the task would include, but not be limited to, thorough research of relevant models, demand analysis for the center's and program elements, analysis of four potential sites, analysis of governance options and partnership opportunities, financial analysis, and final feasibility analysis and recommendation. Through follow up conversations with PlaceWorks, WRCOG staff agreed that \$249,823 is an adequate amount to conduct this initial feasibility study, which is a crucial phase of moving the EXPERIENCE concept forward.

Prior Action:

January 11, 2017: The Administration & Finance Committee received report.

Fiscal Impact:

Funding for the EXPERIENCE feasibility study has been programmed accordingly under the Fiscal Year 2017/2018 Agency Budget, in the General Fund. If approved, the \$249,823 for PlaceWorks will be transferred to the Government Relations Program under consulting fees as part of the 1st Quarter Budget Amendment for Fiscal Year 2017/2018.

Attachment:

1. PlaceWorks On-Call Services Proposal.

Item 4.B

Allocation of Funding for Regional
Sustainability Demonstration Center
Feasibility Study

Attachment 1

PlaceWorks On-Call Services Proposal

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The future is not very far away.
The more we are together, the more we can achieve.

Be the future.



WESTERN RIVERSIDE
COUNCIL OF GOVERNMENTS



On-Call Planning Services

DISCIPLINE D. GENERAL PLAN/SUSTAINABILITY SUPPORT

WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS | RFP NO. 17-08 | MAY 8, 2017

On-Call Planning Services for the Western Riverside Council of Governments

DISCIPLINE D. GENERAL PLAN/SUSTAINABILITY SUPPORT

RFP NO. 17-08 | DUE MAY 8, 2017

SUBMITTED TO:

WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS

Mr. Christopher J. Gray, Director of Transportation
4080 Lemon Street, 3rd Floor, MS-1032
Riverside CA 92501
951.955.8304 | gray@wrcog.cog.ca.us

SUBMITTED BY:

PLACEWORKS

Ms. Karen Gulley, Principal and Vice President
3 MacArthur Place, Suite 1100
Santa Ana CA 92707
714.966.9220 | 714.966.9221 (fax)
kgulley@placeworks.com



AUTHORIZED SIGNATURE (PRIME CONTACT)

WITH:

HMC ARCHITECTS

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Cover Letter

May 8, 2017

Mr. Christopher Gray
Director of Transportation
Western Riverside Council of Governments
4080 Lemon Street, 3rd Floor
Riverside, CA 92501

Subject: Proposal for On-Call Planning Services: **Discipline D. General Plan/Sustainability Support**

Dear Mr. Gray:

At PlaceWorks, our approach is to bring together *the right people* with expertise in sustainability, comprehensive planning, community engagement, and design and implementation of environmentally sustainable projects in architecture, landscape architecture, and urban agriculture. Our team will be led by Karen Gulley as principal-in-charge and project manager for the EXPERIENCE feasibility study and Tammy L. Seale as project manager for general plan and outreach sustainability support. Karen led the Economic Development & Sustainability Framework project, which helped define what sustainability means to Western Riverside and what actions should be prioritized. Our management and advisory team for this discipline includes principals Brian Judd and Sarah Sutton and associate principals Mark Teague and Joanna Jansen, each with 20 or more years of experience with comprehensive planning or design and demonstrated record of innovative and creative approaches. Our principal team will be supported by a dedicated team of highly qualified planners and designers as needed to meet WRCOG's need for On-Call Planning Support for the General Plan/Sustainability discipline.

PlaceWorks has a long history of conducting a variety of feasibility studies throughout Southern California—from large-scale development studies to transit-related feasibility studies. We believe that this experience, combined with our history of working with WRCOG and member agencies, makes us uniquely qualified to lead the EXPERIENCE feasibility study in partnership with WRCOG. Karen Gulley and Sarah Sutton will lead the PlaceWorks/HMC Architects team for the EXPERIENCE feasibility study. Sarah Sutton is the leader of PlaceWorks' landscape architecture practice with over 35 years of experience in the design of sustainable gardens and landscapes, interpretive programming, and innovative stormwater management practices. We selected HMC Architects to partner with on this project because of their experience in both civic and educational campus projects and demonstration projects involving the application of sustainable design technologies. Eric Carbonnier and Eera Babbtiwale, co-directors and vice presidents of sustainability at HMC, will lead the efforts involving building design and programming. Their co-leadership has certified 3 LEED Platinum projects, 30 LEED Gold projects, and several zero-net-energy facilities throughout California. Our EXPERIENCE team also includes advisors from the Frontier Project, the Lyle Center for Regenerative Studies, the Resource Conservation District, and Solutions for Urban Agriculture to meet with WRCOG and member agencies to discuss their program elements, how they operate, and what is working or not working at their facilities. These discussions will offer valuable insight that will inform the programming and selection of technology, site analysis, and economic analysis.



Our proposal responds to the submittal requirements presented in WRCOG's Request for Proposals, providing our track record for successful comprehensive planning and design projects and detailing our understanding and approach to planning services related to this discipline. Our approach to the scope of work is also based on working with WRCOG on a variety of projects over the past decade. We understand WRCOG's role in the subregion and the importance of the agency taking the lead on programs or projects that benefit all member agencies.

This proposal shall remain valid for a minimum of 90 days. As a Principal with the firm, Karen Gulley is authorized to bind the team to the contents of this submittal and to negotiate contracts on behalf of the firm. For questions, please contact Karen at 714.966.9220 x2347 or kgulley@placeworks.com.

We appreciate the opportunity to submit this proposal and look forward to your response.

Respectfully submitted,

PLACEWORKS

A handwritten signature in blue ink that reads "Karen Gulley".

Karen Gulley, Principal/Vice President
Principal-in-Charge and Project Manager,
Discipline D: EXPERIENCE

A handwritten signature in blue ink that reads "Tammy L. Seale".

Tammy L. Seale, Associate Principal
Project Manager, Discipline D: GP/Sustainability

Firm Capabilities

PLACEWORKS

Founded in 1975, PlaceWorks, Inc. (formerly The Planning Center) is a California S-Corporation serving clients nationwide. The firm employs approximately 130 staff members in seven offices and serves both public- and private-sector clients in the fields of community planning, urban design, economics, transportation planning, landscape architecture, environmental analysis and sciences, and GIS.

Communities don't stand still. As they grow and change, they need to balance diverse interests: the physical with the social, the governmental and economic with the environmental. PlaceWorks works with communities to design strong, sustainable futures. We are committed to collaboration across disciplines, workable solutions, and creating better places for people to live, work, learn, and play. We craft forward-thinking, inventive solutions around long-term consequences. Our talented, multidisciplinary team thrives on tackling complex problems and provides creativity grounded in research and systems-based thinking. Our services include, but are not limited to, the list of services at right.

TRACK RECORD

INLAND EMPIRE COMMITMENT

Since its founding nearly 42 years ago, PlaceWorks has invested in planning the future communities of the Inland Empire, including Western Riverside County. We have completed dozens of large-scale master plans, hundreds of specific plans, nearly a hundred general plans (including Riverside County's and now the second San Bernardino County update), housing elements, transit-oriented development plans, corridor plans, infill development plans, and other comprehensive planning projects for many of the cities in the Inland Empire. We firmly believe that *place matters in everything we do*. We are driven and motivated by the prospect of building healthy, vibrant places in Western Riverside County (and the entire Inland Empire) where culture, commerce, and community thrive.

Few planning consulting teams can demonstrate such a deep and award-winning presence in the Inland Empire.

PLACEWORKS' SERVICES

Community Planning

- Comprehensive Planning, including General Plans and Specific Plans
- Transit-Oriented Development Planning
- Corridor Planning
- Infill Planning and Design
- Zoning and Form-Based Code
- Transportation/Active Transportation Planning
- Housing Research and Analysis
- Transferable Development Rights
- Community Engagement
- Municipal Services
- Geographic Information Systems
- Creative Media, including Web-based Implementation Plans

Design

- Transit-Oriented Design
- Downtown Planning
- Design Standards/Guidelines
- Site Planning
- Large-Scale Planning and Design
- Strategic Plans

Economics

- Economic and Market Analysis
- Economic Development Planning
- Site Selection and Development
- Feasibility Studies

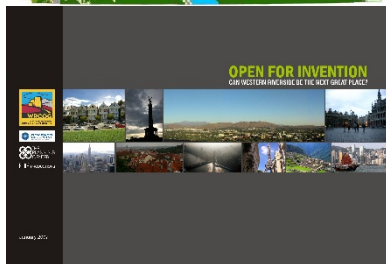
Landscape Architecture

- Streetscape Design
- Parks and Trails Planning
- Urban Agriculture and Urban Forestry
- Storm Water Management Planning
- Evidence-Based Design

Environmental Services

- CEQA/NEPA Documentation
- Third-Party Review
- Technical Studies, including Air Quality and GHG Emissions/Inventory, Noise, Traffic, Shade & Shadow Analysis
- Climate Action Planning
- Site Investigation
- Remedial Engineering Design
- Health Risk Assessment
- Regulatory Compliance

WRCOG's Sustainability Framework Plan



WESTERN RIVERSIDE PROJECT EXPERIENCE

PlaceWorks has led or been involved with regional sustainability projects, including the **SCAG Growth Vision** project—the plan that led to **SCAG's Compass Blueprint Demonstration Plan**, which has been successfully implemented over the past 15 years—and the **Compass Blueprint Reality Check**. PlaceWorks has also led more than two dozen Demonstration projects under this program, including the following—many of which are award-winning (noted with asterisk):

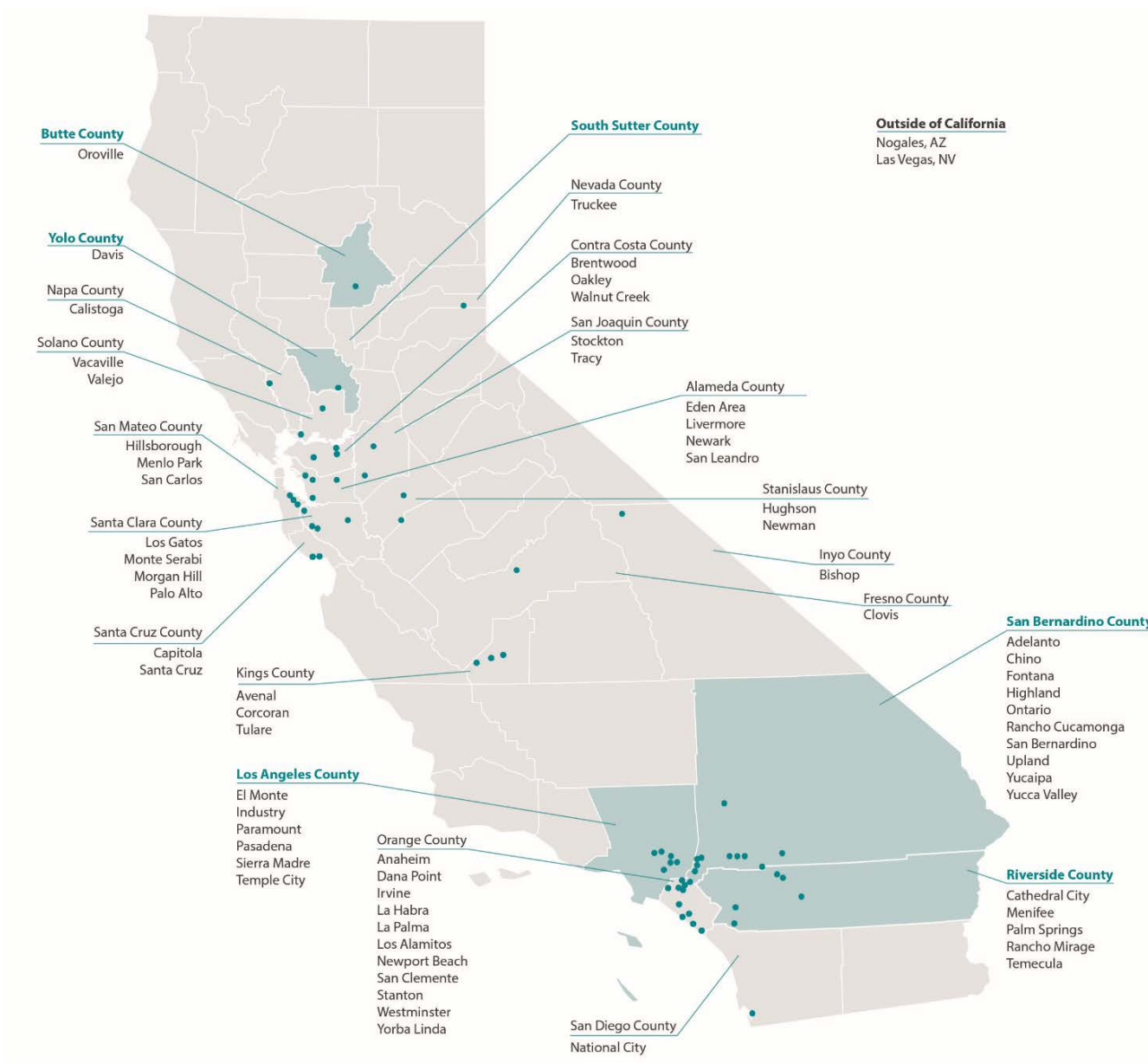
- **WRCOG's Subregional Sustainability Plan Framework (a Compass Blueprint Project).*** Sustainability framework, committee facilitation, policy guidance.
- **WRCOG Non-Motorized Transportation Plan.** Existing conditions analysis, bike/pedestrian routes planning, design guidelines, implementation, outreach.
- **Western Riverside BRT Route Planning.** Transit-oriented design development, land use planning, public outreach.
- **Downtown Riverside Metrolink Station Area Planning/Design and Economic Analysis (a Compass Blueprint Project).** Visioning, transportation and circulation planning, economic studies, feasibility analysis and technical studies, corridor planning, transit-oriented design, site planning, public outreach/community workshops, creative media.
- **Calimesa Boulevard Corridor Revitalization Project (a Compass Blueprint Project).** Corridor planning, architectural design guidelines, downtown corridor district zoning code preparation, public outreach.
- **Perris Metrolink Station Area Planning/Design and Economic Analysis (a Compass Blueprint Project).** Visioning, transportation and circulation planning, economic studies, feasibility analysis and technical studies, corridor planning, transit-oriented design, site planning, public outreach and community workshops, creative media.
- **North Main Corona Station Area Plan/Design and Economic Analysis (a Compass Blueprint Project).** Visioning, transportation and circulation planning, economic studies, feasibility analysis and technical studies, corridor planning, transit-oriented design, site planning, public outreach and community workshops.
- **Riverside County Integrated Project (RCIP).*** Visioning; programming for planning, transportation, and conservation; general plan preparation; community planning for 19 area plans; public outreach; multiple species habitat conservation plan.
- **North Hemet Economic Revitalization Plan, Specific Plan, and EIR.** Land planning, design guidelines, blight assessment, market study, Phase I environmental site assessment, environmental review.
- **WRCOG Videos: "Another Step Forward: Housing to Meet Expected Population and Job Growth" and "Open for Invention: Reducing Dependence on the Automobile."** Storyboard message, mixed-use/high-density research, art direction of video production.

GENERAL PLAN PROJECT EXPERIENCE

PlaceWorks has a 41-year track record of providing successful general plan and sustainability assistance to regional agencies, counties, and local jurisdictions. A

map and partial list of general plans prepared by PlaceWorks is provided below. It is worth noting that very few consulting firms have the same depth of staff with continuous experience managing and overseeing general plans. For the projects listed in the matrix, below, the key staff are still employed with the firm, and many of them are proposed staff for this project. Detailed descriptions of selected projects may be found in Appendix D.

Map of General Plan Projects Prepared by PlaceWorks



General Plans Prepared by PlaceWorks (a partial list)

			Land Use	Policy Analysis	Implementation Program	Public Outreach	Circulation	Housing	Conservation & Open Space	Safety	Noise	Air Quality	Community Design	Economic Development	Environmental Impact Report	Growth Management	Infrastructure/Services
PROJECT	POP.	YEAR	PLAN COMPONENTS														
San Bernardino County General Plan, EIR ²	2,035,210	2018 ¹	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Irvine General Plan EIR	229,985	2017 ¹	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Temple City General Plan, Zoning Code, EIR	36,099	2017 ¹	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Palo Alto Comprehensive Plan Update, EIR ³	64,403	2017 ¹	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Westminster General Plan, EIR ³	91,377	2016	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Pasadena General Plan Update, EIR	137,122	2015	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Vacaville General Plan Update, EIR ³	96,450	2015	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Clovis General Plan Update, EIR	93,000	2014	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Yucaipa General Plan Update, EIR ³	51,367	2014	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Los Alamitos General Plan, EIR	11,449	2014	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Capitola General Plan Update, CAP, EIR	10,198	2014	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Menifee Inaugural General Plan, EIR ³	67,000	2014	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Yucca Valley General Plan, EIR ³	20,700	2013	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Upland General Plan Update, EIR	76,982	2013	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
El Monte General Plan Update, EIR ³	125,000	2011	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
National City General Plan, EIR, CAP	61,419	2011	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Tracy General Plan, EIR ³	82,107	2011	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Ontario General Plan Update, EIR ^{2,3}	172,000	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Butte County General Plan Update, EIR ³	83,900	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Eden Area, Alameda Co. General Plan, EIR	63,000	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Envision Chino: General Plan 2025, EIR ³	82,830	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Los Gatos General Plan Update, EIR, Sustainability Plan	28,800	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Oroville General Plan & Development Code Update	13,550	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
San Carlos General Plan Update, EIR ³	28,352	2010	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Palm Springs General Plan Update, Urban Design Guide, EIR ³	48,000	2007	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Rancho Mirage General Plan Update, EIR ³	17,000	2006	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Highland General Plan Update, Zoning Code, EIR	51,000	2006	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
San Bernardino (City) General Plan Update, Specific Plans, Comprehensive EIR	198,000	2005	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Anaheim General Plan & Zoning Code Update, EIR ³	338,000	2004	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Fontana General Plan Update, Zoning Consistency Program	150,000	2003	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Riverside County General Plan Update ³	2,125,000	2003	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Rancho Cucamonga General Plan Update	172,000	2001	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Temecula Inaugural General Plan, Zoning Code, EIR	76,000	1993	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■

¹Completion year is estimated. ²Web-based plan. ³Award-winning plan.

Planning That Leads to Action

Anaheim General Plan Update



Downtown Anaheim



Platinum Triangle

Clovis General Plan Update



Clovis Trails



Infrastructure

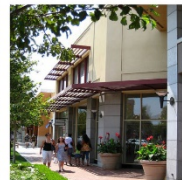


Harlan Ranch

Rancho Cucamonga General Plan Update



Victoria Gardens



Palm Springs General Plan Update & Downtown Urban Design



Downtown Palm Springs



MCAS Tustin Base Reuse/Specific Plan



Villages of Columbus



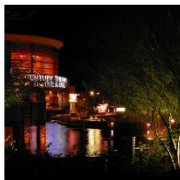
Temecula General Plan (Original)



Harveston Lake Community



Rancho Mirage Hwy. 111 Specific Plan



The River at Rancho Mirage



EXPERIENCE LEADING REGIONALLY SIGNIFICANT PROJECTS

PlaceWorks has strong experience working with metropolitan planning organizations (MPOs) and regional councils of governments (COGs) throughout the state of California on a broad range of regionally significant planning, transportation infrastructure, and community outreach projects, including experience with SCAG, Fresno COG, Kern COG, SANDAG, and WRCOG.

Many projects completed for these regional agencies require significant multi-jurisdictional coordination, including collaboration with multiple municipal and county agencies, state and local transportation agencies, and local stakeholder groups. Among these collaborations are:

Projects in San Bernardino County

- **San Bernardino County Strategic Visioning.** Regional visioning, stakeholder interviews, GIS, infographics.
- **The Countywide Plan and EIR.** Policy planning, economic analysis, transportation planning, environmental analysis, data management, public outreach, community planning, web design, and more.
- **San Bernardino County Retail Food Assessment.** Presentation to community benefits stakeholder group.
- **Countywide GIS Vacant and Underutilized Land Analysis.** GIS analysis, opportunities and constraints analysis, mapping and graphics.
- **San Bernardino TOD Overlay District.*** Zoning overlay, station area planning, stakeholder/public outreach, EIR addendum.
- **Crafton Hills College Village/Greater Dunlap Neighborhood Sustainability Community Strategy.** Zoning, conceptual site plan, design, 3D modeling.
- **San Bernardino Climate Adaptation, Resiliency, and Environmental Justice.**
- **The Glen Helen Specific Plan.*** Specific plan preparation, EIR preparation, resource management plan.
- **San Bernardino County Housing Element.** Housing policy and program development.
- **Land Use, Air Quality, and Transportation*** prepared for SANBAG and the County of San Bernardino. An ahead-of-its-time manual for planning practitioners.

Projects in Orange County

- **MCAS Tustin Base Reuse Plan/Specific Plan.** Master planning, visioning, programming, land planning, specific plan preparation, environmental review and analysis, entitlements.
- **Villages of Columbus Infill Development.** Community planning and programming, affordable housing and density bonus implementation program, project entitlements.
- **Tustin Legacy Specific Plan and EIR.** Visioning, base map (CAD), economic market analysis, specific plan and hybrid form-based code, supplemental EIR, park charrette, streetscape design.

- **Advanced Technology & Education Park Development Master Plan.** Design charrettes, site plan alternatives, visioning poster, goals and design parameters, specific plan/development agreement compliance.
- **MCAS El Toro Base Reuse Planning.** Open space plan, business park design guidelines, agricultural plan, airport terminal landscape plan, financial analysis, due diligence (later for Lennar/LNR properties).
- **Orange County Great Park Environmental Planning.** CEQA analysis for master planned community, general plan amendment, zone change, and tentative maps; air quality/greenhouse gas and noise studies.
- **Parcels at El Toro Property Reuse Planning.** Scenarios for future reuse of several county-owned properties adjacent to the Great Park and future Great Park Neighborhoods development. Conceptual site planning, market positioning, presentation to board of supervisors.

SUSTAINABLE GARDENS, LANDSCAPE, OPEN SPACE RESTORATION, AND URBAN AGRICULTURAL PROJECTS

PlaceWorks' landscape architecture group designs sustainable gardens and landscapes, interpretive programming, and innovative stormwater management practices. Demonstration projects that incorporate innovative and sustainable techniques include the award-winning Water-Efficient Demonstration Garden for the Santa Clara Valley Water District, which showcases low-water-use irrigation methods and locally appropriate plant species, and the Gardens at Heather Farm, which features a large greenhouse, outdoor classroom space, and raised beds for crops all surrounded by California natives and insectary plants to enhance pollination and repel unwanted pests.

PlaceWorks has worked in communities throughout the state to identify opportunities, develop plans, and help implement urban greening programs. The City of Alameda Urban Farm and Garden Plan prioritizes sites for various types of agriculture and provides recommendations for policies and programs, guidelines for the management and design of urban agriculture projects, funding and financing resources, and conceptual designs for urban farms and gardens. The Martial Cottle Park Master Plan includes a 300-acre historic agricultural farm in San Jose.

SERVICES

Standard

- Architectural Design
- Feasibility Studies
- Grant Writing
- Renewable Energy Analysis
- ZNet/high-performance assistance
- Energy Modeling
- Lifecycle Analysis
- Construction Administration
- Cost Estimating
- Facility Assessment
- Graphic Design
- Interior Design
- Program and Project Management
- Master Schedule Preparation
- Public and Non-public Bidding Assistance
- Specification Writing

Additional

- 3D Modeling
- Digital Imaging
- Programming and Master Planning
- Interior Furnishings, Furniture, and Equipment Selection Assistance
- Financial Needs Assessments
- Facilities Standards Development
- Site Selection Assistance

SUBCONSULTANT: HMC ARCHITECTS (EXPERIENCE)

HMC Architects (HMC), a 100% employee-owned Corporation, was founded in 1940 in Ontario, California, and has since expanded to nine offices around the western United States. Since 1940 they have worked with healthcare, education, corporate, civic, and justice clients to create architecture and interior design that is inviting, high performing, sustainable, and human focused. For HMC Architects, the science and art that promote environmental, cultural, and social sustainability are necessary parts of the design engine. Their process brings leading-edge thinking to the spaces that encompass human interaction and directly impact quality of life. As part of their commitment to environmentally neutral design, HMC Architects focus on integrating high-performance, sustainable architecture into all of their projects. The work for this project will primarily be performed from the Ontario office: 3546 Concourses Street | Ontario, CA 91764 | 909. 989.9979.

HMC's expertise in high performance design and zero-net-energy solutions encompasses a diverse and broad range of project types in civic, pre-K through 12, higher education, healthcare, justice, and commercial sectors. Our proposed team has direct and substantial experience performing services on projects similar to WRCOG's EXPERIENCE project, notably the Frontier Project—an energy and water demonstration facility in Rancho Cucamonga.

HMC Architects is an equal opportunity employer and makes employment decisions on a variety of factors, including merit. Firm policy prohibits unlawful discrimination based on race, color, religious creed (including religious dress and grooming practices), age, gender, sexual orientation, national origin or ancestry, religion, marital status, domestic partner status, military service/veteran status, sex (including pregnancy, childbirth, breastfeeding, and medical conditions related to pregnancy, childbirth, or breastfeeding), physical or mental disability, medical condition including genetic characteristics, genetic information, gender identity, gender expression, or any other consideration made unlawful by federal, state, or local laws. It also includes a perception that anyone may have any of those characteristics or is associated with a person who has or is perceived as having any of those characteristics. All such discrimination is unlawful.

Milly Christmann is HMC's vice president of human resources and their diversity manager. Together with Mitch Carp, HMC's senior vice president of studio operations, she manages employee, supplier, and contractor diversity efforts. HMC's leadership is 15 percent female and 85 percent male; the minority breakdown is 2 percent black, 9 percent Hispanic, 12 percent Asian, and 77 percent white.

HMC RELEVANT PROJECT EXPERIENCE

- **The Frontier Project, Cucamonga Valley Water District.** A 14,200 SF sustainability demonstration building, LEED Platinum certified, that helps resident consumers, commercial builders, and sustainable advocates learn the latest methods and technologies in water, energy, and site conservation.
- **Health and Human Services Agency Zero Net Energy Facility, County of San Diego.** A new facility to implement low-impact development standards, use sustainable design principles and practices, and exemplify high-performance architecture with minimal environmental impacts. Emphasizing workplace health, productivity, and overall occupant satisfaction resulted in a design that departed from traditional big-box buildings by inviting sun, wind, and light to inform site planning, building orientation, and indoor environments.
- **Los Banos Community Center.** Planning and design services for the 34,400 SF community center adjacent to the existing Henry Miller Plaza. The new community center complements the park's outdoor amenities with additional community gathering space.
- **Woodcrest Library, County of Riverside Economic Development Agency.** A 10,000 SF library on two acres of land in the residential Woodcrest area of Riverside County. Includes an extensive water-wise demonstration garden and high-performance features such as low-water native landscaping, a permeable parking lot, ambient lighting from roof and windows, and durable and sustainable building materials.
- **Clearwater Elementary School, Perris Unified School District.** A new campus forged during one of California's most severe droughts on record. The design team created learning environments that model water conservation. Wetlands basins were created to enhance student understanding of how the site collects and retains stormwater, filters out pollutants, and recharges the basin by reducing run-off using bioswales leading to bioretention ponds.

Additional details regarding these projects can be found in Appendix. D.



KEY STAFF

Name, Title	Role / Coverage Level (Time Available for This Project)	Experience/Qualifications Summary
MANAGEMENT AND COORDINATION		
KAREN GULLEY Principal 	Principal-in-Charge Project Manager for EXPERIENCE, and Public Outreach for General Plan Work <i>Availability: 30%</i>	Karen's strong skills of strategy and innovative problem solving are the result of nearly 30 years of experience working with all facets of community planning and design for private- and public-sector clients. She leads the firm's transit-oriented development (TOD) practice as well as infill development and corridor revitalization. She specializes in assisting local communities with evaluating the potential for TOD associated with Metrolink, BRT, and urban circulation. Her work ranges from vision plans to implementation strategies, each developed in a collaborative effort with city staff, transit agencies, and the public. Karen has a certificate in "Planning for Effective Public Participation" from the International Association for Public Participation.
TAMMY L. SEALE Associate Principal 	Principal/Project Manager for General Plan/Sustainability (all except EXPERIENCE) <i>Availability: 50%</i>	Tammy specializes in sustainability and climate change services. As an environmental planner in the public interest for more than 20 years, she is committed to working with communities to identify and implement local strategies to address climate change and is honored to work with an outstanding team of sustainability planners and analysts every day in collaborating with staff and local agency partners. She prepares local sustainability, climate, and energy action policies and plans to address local economic, environmental, and equity goals. Recent projects included serving as project director/principal-in-charge for a mix of comprehensive planning and visioning projects that integrate sustainability and resiliency vision and principles, including, among others, Plan Morro Bay (a general plan and local coastal plan update), San Bernardino County Renewable Energy and Conservation Element, San Luis Obispo Downtown Concept Plan, Lancaster Climate Action Plan, and San Luis Obispo County Renewable Energy Streamlining Program.
GENERAL PLAN/SUSTAINABILITY STAFF		
ELI KRISPI Associate	Planner – General Plan elements, outreach <i>Availability: 50%</i>	Eli works on planning projects to reduce environmental impacts and increase resiliency to a changing climate. As a planning and sustainability professional, he draws on experience implementing sustainable policies, a science-based education focused on the nexus of the built environment and the natural world, and a data-driven analytical approach to problem solving.
SUZANNE SCHWAB, AICP Associate	Associate Sustainability Planner – General Plan elements, outreach Planning Support for General Plan Element updates and outreach <i>Availability: 25%</i>	Suzanne combines her experience as a designer, researcher, and writer with a practical approach and an emphasis on the end user. Her planning documents are user friendly and reflect her creative problem-solving skills. Her experience includes several housing elements and corridor, site, and specific plans.

Name, Title	Role / Coverage Level (Time Available for This Project)	Experience/Qualifications Summary
MATT GELBMAN, AICP Associate	Associate Sustainability Planner – Planning Support for General Plan Element updates and outreach <i>Availability: 25%</i>	Matt is a superb public organizer of outreach, with an ability to meld technology with project needs. His command of the technology and foundation in planning will assist in communicating program needs.
BRIAN JUDD Principal	General Plan Advisor <i>Availability: 10%</i>	Brian pilots an integrated team of practiced policy planners and innovative designers to create resourceful solutions for the company's often complex and always challenging projects. Brian has managed and overseen nearly 20 general plan projects, including Palm Springs, Rancho Mirage, Yucaipa, and Highland, as well as the web-based Ontario and San Bernardino County General Plans (in progress). His past experience includes serving as one of the three leads on the Riverside County General Plan—a role which included research and preparation for seven community plans in Western Riverside County. Specializing in intergovernmental coordination and general plan implementation Brian has vast experience and a keen understanding of multijurisdictional regulatory and political processes.
MARK TEAGUE, AICP Associate Principal	Senior Advisor, Planning Support for General Plan Element updates and outreach <i>Availability: 20%</i>	Mark's experience includes a variety of controversial and complex projects of all sizes and virtually all project types as both a public agency and private-sector planner. He facilitates internal agency departmental discussions and conducts evaluations of ordinances, policies and operations making recommendations to help improve customer service and respond to public concerns.
JOANNA JANSEN, AICP Associate Principal	General Plan Advisor <i>Availability: 20%</i>	Joanna has significant experience in the organization and facilitation of public involvement programs, both as stand-alone outreach efforts and as part of larger planning projects. She believes that meaningful community engagement from the earliest stages of a project enhances the ultimate outcome and establishes invaluable public support for its implementation
STAFF for EXPERIENCE		
SARAH SUTTON, ASLA, LEED AP Principal	Principal Landscape Architect <i>Availability: 15%</i>	Sarah leads the landscape architecture group and brings over 35 years of experience in the design of sustainable gardens and landscapes, interpretive programming, and innovative stormwater management practices. Sarah has designed numerous demonstration projects that incorporate innovative and sustainable techniques, Sarah receives frequent invitations to present at conferences and to various organizations.
ISBY FLEISCHMANN, LEED AP Senior Associate	Landscape Architect/Designer <i>Availability: 25%</i>	Isby brings extensive experience developing plans and programs for community gardens, urban agriculture, and sustainable landscapes. Isby has worked in communities throughout the state to identify opportunities, develop plans, and help implement urban greening programs.

Name, Title	Role / Coverage Level (Time Available for This Project)	Experience/Qualifications Summary
RANDAL W. JACKSON, ASLA Principal	Advisor <i>Availability: 10%</i>	Throughout his more than 45 years of experience in planning and design, Randy has conceived and developed unique land use and design concepts for award-winning communities. He continues to focus his expertise on healthy communities built around and integrating transportation, transit, open space, and park and recreation systems.
SUBCONSULTANT FOR EXPERIENCE: HMC ARCHITECTS		
CHRIS TAYLOR, AIA, LEED AP, BDIA Principal	Principal in Charge of HMC's General Plan/ Sustainability Support Tasks <i>Availability: 20%</i>	Chris has more than 30 years of experience and passionately devotes his attention to coordinating the best delivery practices that continually raise the quality of HMC's drawings, design, and client service. Chris has developed a reputation for successfully leading collaborative, consensus-building processes that result in facilities that meet the current and future needs of his clients.
ERIC CARBONNIER, PhD, AIA, LEED AP BD+C Vice President of Sustainability	Co-director of HMC's Sustainability General Plan/ Sustainability Support Tasks <i>Availability: 20%</i>	With 28 years of experience, Eric focuses on energy conservation strategies leading to zero-net-energy architecture. He helps develop and integrate sustainable strategies, including groundwater recharge, water conservation, thermal and electrical on-site renewable energy, downdraft cool towers, and local material reuse. Eric has secured over \$2 million in grants and certified the second largest USGBC campus in California, ranked 7th nationally and 9th globally.
EERA BABTIWALE, LEED AP BD+C Vice President of Sustainability	Co-director of HMC's Sustainability General Plan/ Sustainability Support Tasks <i>Availability: 20%</i>	With 17 years' experience, Eera's strong design skills and passionate environmental awareness result in projects that are functional, creative, and sustainable. She is dedicated to the research, development, and implementation of advanced, high-performance architecture and integrates high-performance environmental concepts into projects using the most advanced tools and techniques.
JACOB BOWMAN Senior Cost Estimator	Senior Cost Estimator of HMC's General Plan/ Sustainability Support <i>Availability: 20%</i>	Jacob has 14 years of industry experience with a background in architecture and engineering design. He has estimated projects ranging from medical office buildings to complete greenfield hospitals, with costs ranging from less than \$1 million to more than \$2.5 billion at all phases, from concept through construction documents, and he has provided value engineering and change-order review on numerous projects.

OWNERSHIP, SIZE, AND LOCATION OF OFFICES

PlaceWorks has seven offices throughout California, and all are maintained (owned) by the corporate office. Branch and field offices are overseen by principal shareholders. For example, Brian Judd is responsible for the operation of the firm's Los Angeles and Central Coast offices. The locations, size (by number of employees), and ownership information are provided in the matrix below.

Office	Office Size (No. of Employees)	Ownership (Shareholder Responsible for Office Operations)
ORANGE COUNTY HEADQUARTERS 3 MacArthur Place, Suite 1100 Santa Ana CA 92707	58	Keith McCann CEO/CFO
INLAND EMPIRE 2850 Inland Empire Blvd., Suite B Ontario, CA 91764	4	Dwayne Mears, AICP Principal and Board Chairman
LOS ANGELES 700 S. Flower Street, Suite 600 Los Angeles CA 90017	11	Brian Judd Principal and Vice President
SAN DIEGO 750 B Street, Suite 1620 San Diego CA 92101	6	Karen Gulley Principal and Vice President
CENTRAL COAST (field office) PO Box 1316 San Luis Obispo CA 93406	1	Brian Judd Principal and Vice President
NORTHERN CALIFORNIA 1625 Shattuck Ave., Suite 300 Berkeley CA 94709	43	Steve Noack, AICP Principal
CENTRAL VALLEY (field office) 1865 Herndon Ave., Suite K Box 121 Clovis CA 93611	1	Steve Noack, AICP Principal

ORGANIZATIONAL INFORMATION

PlaceWorks, Inc. is a California S-Corporation. Although the firm has changed its name, PlaceWorks, Inc. is the same company as founded in 1975 and with the same California corporation number (C0753564). The company has always maintained its certification as a “company in good standing” with the State of California, and the organization is financially stable.

Name history is as follows.

- 1975. Founded as The Center for Planning & Research
- 1977. Incorporated as The Planning Center, Inc.
- 2011-2014. After acquiring Design, Community & Environment (DC&E), did business as The Planning Center|DC&E through March 2014.
- 2014. Changed company name to PlaceWorks, Inc.

Officers of the firm are:

Name, Title	Officer Designation	Years with Firm
Randal W. Jackson, ASLA	President	40
Dwayne Mears, AICP	Chairman	32
Keith McCann	CEO/CFO and Co-Treasurer	11
Brian Judd	Vice President	18
William Halligan, Esq.	Vice President and Co-Treasurer	13
Karen Gulley	Vice President	26

EQUAL OPPORTUNITY/NONDISCRIMINATION POLICY

PlaceWorks is an equal employment opportunity employer and is committed to maintaining a work environment and employment practices which are free of unlawful discrimination, harassment, and retaliation. PlaceWorks prohibits discrimination and harassment in employment based on race, religious creed, color, citizenship, national origin and ancestry, sex, gender, gender identity, gender expression, age, marital/domestic partner status, sexual orientation, physical or mental disability, medical condition, including genetic information or characteristics, military and veteran status, status as a victim of violence, sexual assault, or stalking, and/or any other basis protected by applicable federal, state and local laws. This policy applies to all persons at our workplace and/or involved in our operations, such as an employee, supervisor, intern, volunteer, or applicant, as well as other third parties who are regularly involved in our operations and/or who are authorized to be in our workplace or on our work site such as a client, independent contractor, subcontractor, agency temporary employee, or vendor.

MINORITY AND FEMALE RECRUITMENT

PlaceWorks believes that diversity enhances our workplace, contributes to productivity, and promotes collaboration amongst employees, and we encourage minorities and women to apply for all positions and opportunities available within our Company. All recruitment, hiring, and promotion decisions are made on an equal opportunity basis according to the most qualified candidate(s) or employee(s) who possess the needed skills, education, experience, and other qualifications that are required for the position.

Minority and Female Leadership. On the “Leadership” page of our website, we list the firm’s leaders, which include shareholders and other principals and associate principals. Of these, 46.5 percent are women. Also, PlaceWorks is owned by 18 shareholders, of whom 39 percent are women and 6 percent are classified as minority.

Approach and Understanding

OVERALL PROJECT UNDERSTANDING

PlaceWorks understands that WRCOG requests a consultant team that can provide general plan and sustainability support to its member agencies. Although this discipline could include a range of tasks, WRCOG’s RFP identifies three examples of general plan and sustainability support tasks:

1. Update one or more elements of their general plans with a focus on sustainability planning.
2. Develop and implement appropriate community engagement plans to engage stakeholders.
3. Prepare a feasibility study for a regional sustainability center.

In response to the RFP, this section presents our general understanding of the general plan and sustainability discipline, our general approach to general plan updates and community engagement, and our specific approach and detailed scope of work to prepare a feasibility study for a regional sustainability center, also referred to as EXPERIENCE.

GENERAL PLAN AND SUSTAINABILITY SUPPORT UNDERSTANDING AND APPROACH

WRCOG has provided the Economic Development & Sustainability Framework (2012) to facilitate public discussions and investments in support of a “successful, sustainable, and resilient subregion that current and future generations will continue to choose as a place to live, work, learn, and enjoy their lives” (p. 9). WRCOG’s Economic Development & Sustainability Framework has supported the development of many implementation resources and tools for WRCOG members, including the Subregional Climate Action Plan and Climate Adaptation and Resiliency Study, a healthy communities program, the Clean Cities Coalition, the Western Riverside Energy Partnership, energy efficiency and renewable energy financing programs, an active transportation program, and the BEYOND Framework Fund, among others. The resources and tools provide direct, multilevel support—to homeowners and business owners through financing or incentives to reduce energy costs, conserve energy, increase mobility, and reduce GHG emissions; and to member agencies to support development and implementation of sustainability policies and programs, including preparation of stand-alone climate action plans and updated general plans or general plan elements that build from and integrate

the Economic Development & Sustainability Framework into local initiatives and respond to new state directives for sustainability, climate change, and resiliency planning.

Tammy Seale, our director of Climate Action and Resiliency Services, will serve as the primary contact for our tasks related to general plan and outreach sustainability support. Tammy joined PlaceWorks in January 2017 to expand our expertise in climate change, sustainability, and resiliency services to our municipal clients. Tammy will work with an outstanding team, including Brian Judd, principal and PlaceWorks' director of Comprehensive Planning and Design; Joanna Jensen, associate principal; and Mark Teague, associate principal. The support of our principals reflects our dedication to WRCOG and commitment to provide our depth of experience to support the subregion.

INTEGRATE SUSTAINABILITY, CLIMATE CHANGE, AND RESILIENCY INTO THE GENERAL PLAN

WRCOG's members include 17 cities and 1 county that have general plans as well as direct responsibility and discretionary authority for land use. Other members—water agencies, a school district, and a Native American tribe—have a mix of land use authority and/or control of utilities. The city and county general plans have been developed and updated throughout the years, with approximately half updated in the last 5 to 8 years and half updated 8 to 15 years ago. Most plans updated more than 8 years ago are not likely to directly address climate change, sustainability, environmental justice, or public health. More recent general plans, Calimesa and Perris for example, include dedicated sustainability elements or components that address reduction of greenhouse gas emissions and economic development and revitalization programs.

Many important community values will drive goals, policies, and implementation actions in a general plan, including sustainability, climate change, and resiliency. The Sustainability Framework and supporting programs help to initiate community conversations to further define what sustainability means to each community. In many respects, the broadest definition of sustainability—encompassing the environment, economy, and equity—is a good starting point for assessing community vision, values, and needs. We will work with staff and the community to understand how best to address sustainability in the context of the general plan (for example, as a stand-alone element or as part of other elements). We would work with WRCOG and city staff to prepare a detailed scope of work for a general plan update based on a clear understanding of community objectives.

RESPOND TO A CHANGING REGULATORY ENVIRONMENT

PlaceWorks' planning and environmental teams work together to stay apprised of ever-changing legislation, regulatory changes, and trends. We are proactive with

agencies, professional organizations, and the legal community to ensure that our documentation and process implementation reflect the current state of planning and technical advancements. Our approach to general plan updates, whether a comprehensive update or preparation of one element, would leverage and integrate the Economic Development & Sustainability Framework, Subregional Climate Action Plan, and other regional plans and programs with local values and needs to prepare locally appropriate goals and policies for one or more elements (sustainability, economic, public health, climate change, energy or similar) and to respond to recent legislative changes to the greatest extent feasible.

Recent legislative changes that address sustainability and resiliency include:

- Senate Bill (SB) 1241 (September 2012) requires jurisdictions to address the risk of fire on land classified as a state responsibility area and very high fire hazard severity zone, and to include goals, policies, and feasible implementation measures that protect the community from wildfire risks in the general plan safety element.
- SB 743 (September 2013) revolutionizes CEQA analysis of transportation impacts by eliminating levels of service and requiring a new, multimodal metric (e.g., vehicle miles traveled).
- SB 13 (September 2015) introduces the formation of groundwater sustainability agencies and requires implementation of groundwater sustainability plans.
- SB 379 (October 2015) requires jurisdictions to include climate adaptation and resilience strategies in the general plan safety element.
- SB 32 (September 2016) establishes a new greenhouse gas reduction target for year 2030 by requiring the state to reduce greenhouse gas emissions to 40 percent below 1990 levels by 2030.

PlaceWorks has prepared over 100 general plans throughout California over the last four decades, and we recognize the value and importance of the general plan and the responsibility of being entrusted to partner with the community to update its plan. Our approach to general plan updates is based on a collaborative and engaging process that relies on a solid foundation of technical analysis, review of best practices for local applicability, and a community and stakeholder conversation that supports bold visionary thinking and feasible local opportunities.

COMMUNITY ENGAGEMENT TO SUPPORT GENERAL PLAN UPDATE EFFORTS

Whether a general plan update is comprehensive or a focused update of one or more elements, the vision, priorities, goals, and policies are all influenced by the broad range of community opinions and insights that are gathered through a meaningful community and stakeholder engagement process. Today, in our fast-paced, plugged-in world, traditional public workshops and advisory committee

meetings must be supplemented or sometimes replaced by new models of community engagement designed to generate meaningful and broad-based input from residents and businesses. Public outreach must work the way people work. We understand residents are busy with family, after-school activities, sports teams, volunteer organizations, and demanding jobs. To be effective, we partner with our clients to reach people the way they need and want to be engaged and at multiple levels—online or in person, in small groups or large, on topics big or small.

Each work program to assist a member agency in the update of a general plan element(s) to address sustainability will drive the community engagement process—the details of what, how, and when to give the community the best opportunities for meaningful input and or/education. We will sit down with each jurisdiction and use IAP2’s Public Participation Spectrum to define the public participation goal and the best techniques to achieve that goal. If the update is predicated on complying with new state laws, the public participation goal may only be to provide the public with objective information to understand the problem, alternatives, mandates, and/or solutions. If the update involves a broader conversation with the public about a range of potential economic, environmental, or infrastructure-related actions, a more robust goal of involving or collaborating with the community may be in order. Our approach would include preparation of a public participation plan with detailed guidance for conducting community outreach during the project. The plan will include the objectives for public involvement, key messages for project communication, assessment of potential project issues, a description of stakeholders, a schedule for the outreach program, roles of any advisory or steering committees, and recommendations for inclusion of any of the following engagement opportunities.

- **Advisory/Steering Committee Meetings.** This is an excellent technique when the goal of the outreach is to involve or collaborate with the public. An advisory committee consisting of a cross-section of the community would be responsible for: getting into the details of the project, providing recommendations on key decisions, being a conduit for the public, and being a sounding board throughout the process. Advisory or steering committees are typically supplemented by more traditional public workshops or open houses.
- **Focus Groups.** An alternative to an advisory committee, this approach allows a smaller group to focus on a particular subject rather than being involved in all aspects of the project. If the general plan update involves multiple elements, it may be easier to get sustained involvement by a committee if they are focused on the subject that matters most to them.
- **Public Workshops.** Community workshops are intended to reach the broader public and give them a way to learn about the project and provide input. Technology may afford new ways to involve people, but nothing can replace the synergy of people sharing ideas for the betterment of their community in the comfortable setting of a well-managed meeting. Accomplishing such a meeting

requires careful consideration of meaningful discussion questions and activities that will yield useful input.

- **On-Line Civic Engagement.** This has become an essential component for nearly all general plan updates. An on-line forum will allow the project team to post topics and relevant background information to keep the community engaged throughout the project. Techniques include surveys, polls/online voting, mapping, idea(s) submission, and feedback on draft policies/concepts. Online engagement typically results in gathering the views of a much larger and more representative population, rather than the more limited perspective of those who typically attend public meetings.
- **Stakeholder Interviews.** recommended as one of the best ways for the project team to quickly assess perspectives on the topics to be considered in the General Plan element. As part of the Public Participation Plan we would develop the list of stakeholder representatives and then coordinate scheduling of individual interviews. Depending on the topics to be addressed, stakeholders could include different community organizations, developers, business owners, and landowners. PlaceWorks would facilitate the interviews and create a summary identifying major themes.
- **Project Fact Sheets.** These are typically prepared at the beginning of the project and updated once or twice during the project. Fact sheets are intended to provide the relevant background information to support the overall community engagement program. They can be structured to educate the public about topics that are being addressed, or structured to answer the most frequent questions. Fact sheets are important informational materials that are widely distributed.
- **Pop-up Outreach.** This outreach approach goes to where the people are. In some communities, turnout at a public workshop may be little to nonexistent. In those cases, it is often better to set up a booth at a city event, farmer's market, sports park, or location where people typically gather. Pop-up outreach is best used at the beginning of a project to "get the word out," gather initial ideas and comments, and direct people to the website for future information.

All general plan products prepared for public review will be visually engaging and designed to communicate information concisely through maps, tables, charts, photographs, visual simulations, and other graphics. Our goal is to use precise and plain language, with minimal planning jargon and other terms that are not in general use. Our documents and other work products will make it easy for the public, general plan advisory committee, and elected officials to understand key background information and analysis, community vision, options, and recommendations. We structure general plans and elements to be simple and intuitive, with a minimum of explanatory text, and designed to easily accommodate future updates and amendments.

EXPERIENCE FEASIBILITY STUDY UNDERSTANDING AND APPROACH

This is a unique opportunity for WRCOG to advance sustainable pathways toward regenerative futures. The Economic Development & Sustainability Framework sets forth a vision for a sustainable Western Riverside County, involving regional collaboration and local action in the areas of economic development, education, health, energy and environment, transportation, and water. It was predicated on the understanding that WRCOG, as a regional planning organization, has a series of unique roles in the arenas of convening dialogues, advocating goals, facilitating local action, and acting regionally. The concept of EXPERIENCE embodies all four of these roles or missions:

- EXPERIENCE will be a place to convene a dialogue, share best practices, and promote collaboration among public and private sector entities.
- The activities involved with *gathering*, *learning*, and *exploring* will also be tools to advocate for the types of policies, regulation, projects, and investments that will improve sustainability in the region.
- The interactive demonstrations, technology displays, outdoor classrooms, and healthy-eating elements will be designed to facilitate and encourage local action.
- A regional sustainability center will be another example of WRCOG acting regionally to showcase sustainability projects, programs, and ideas that all member agencies and community members can benefit from.

This project is the first phase of study involving extensive discussions with WRCOG members, evaluating demand and relevant case studies, performing an opportunities and constraints assessment, conducting conceptual site planning and high-level costing, and making final recommendations on preferred programming and location. As a feasibility study, this project must be conducted objectively, from how meetings are facilitated to a decision process that is structured and transparent.

EXPERIENCE—OUR APPROACH

Our approach is to bring together *the right people* with expertise in design and implementation of environmentally sustainable projects in architecture, landscape architecture, and urban agriculture. The people who will lead the conceptual design, programming, and testing of ideas have dedicated practices in applying innovative technology to the design of buildings and outdoor environments.

Karen Gulley will oversee the PlaceWorks and HMC team and will be joined by Sarah Sutton and Isby Fleishmann, lead landscape architects and designers at PlaceWorks. Sarah Sutton leads the landscape architecture group and has over 35 years of experience in sustainable gardens and landscapes, interpretive

programming, and innovative stormwater management practices. She has designed numerous demonstration projects that incorporate innovative and sustainable techniques, including the award-winning Water-Efficient Demonstration Garden for the Santa Clara Valley Water District, which showcases low-water-use irrigation methods, and the Gardens at Heather Farm, which features California native and insectary plants to enhance pollination and repel unwanted pests. As a leader in the firm's continuing commitment to environmental stewardship, Sarah receives frequent invitations to present at conferences and to various organizations. Senior Associate Isby Fleishmann also has extensive experience developing plans and programs for community gardens, urban agriculture, and sustainable landscapes, working with communities throughout the state to help implement urban greening programs. Her experience includes the City of Alameda Urban Farm and Garden Plan, which prioritizes sites for various types of agriculture, and the Martial Cottle Park Master Plan, which includes a 300-acre historic agricultural farm in San Jose. Additionally, Isby collaborated with the Lyle Center for Regenerative Studies as part of her graduate studies.

We selected HMC Architects to partner with on this project because of their experience in both civic and educational campus projects and demonstration projects involving the application of sustainable design technologies. We also recently partnered with HMC Architects on a "framework plan" for South Orange County Community College District's Advanced Technology & Education Park (ATEP). The high-level site feasibility analysis, visioning and programming effort, and design components of the ATEP Framework Plan are similar in effort to this project. Eric Carbonnier and Eera Babsiwale are co-directors and vice presidents of sustainability and will lead the efforts involving building design and programming. Eric is an architect with 20 years of experience in zero-net-energy/low-energy civic and educational planning and design projects throughout California that ranged from \$1 million to \$400 million. Eric also was the architect for the Frontier Project, a relevant case study for EXPERIENCE.

Their co-leadership has certified 3 LEED Platinum projects, 30 LEED Gold projects, and several zero-net-energy facilities throughout California. Their firm understanding of public utility incentives and state grants has secured over \$10.5 million in high-performance funds for their clients and the communities they serve.

Our approach also includes bringing in advisors from the Frontier Project, the Lyle Center for Regenerative Studies, the Resource Conservation District, and Solutions for Urban Agriculture to meet with WRCOG and member agencies to discuss their program elements, how they operate, and what is working or not working at their facilities. These discussions will offer valuable insight that will inform the programming and selection of technology, site analysis, and economic analysis.

Two of the advisors include Dr. Kyle D. Brown of the Lyle Center and Aravind Batra of P2S Engineers. Dr. Brown has served as director of the Lyle Center since 2004. The Lyle Center is Los Angeles' premier sustainability campus, committed to a future in which all people live with dignity in safe, healthy, and sustainable environments. Dr. Brown brings to the project team a deep understanding of operating a sustainability campus in Southern California. Aravind Batra, principal engineer with P2S Engineers, brings 20 years of experience of engineering innovation. Mr. Batra serves as principal-in-charge at P2S and has an in-depth knowledge in sustainable design, zero net energy, and renewable energy designs for facilities.

Our approach to the scope of work is also based on working with WRCOG on a variety of projects over the past decade. We understand WRCOG's role in the subregion and the importance of the agency taking the lead on programs or projects that benefit all member agencies. Karen Gulley, principal at PlaceWorks, led the Economic Development & Sustainability Framework project, which helped define what sustainability means to Western Riverside and what actions should be prioritized. We see this project as a continuation of the types of conversations we had with agency officials in setting a more detailed vision for EXPERIENCE and conducting an objective analysis of the possibilities.

SCOPE OF WORK, PHASE 1 FEASIBILITY STUDY FOR EXPERIENCE (A REGIONAL SUSTAINABILITY CENTER)

We have developed a comprehensive scope of work that addresses all the important aspects of undertaking a high-level feasibility analysis on four sites. We have also identified several optional tasks for WRCOG's consideration if budgets allow. We welcome the opportunity to further refine the scope to achieve your goals for this Phase 1 effort.

TASK 1.0 PROJECT INITIATION

1.1 Kick-off with WRCOG Staff

This project will begin with a meeting between WRCOG staff and the PlaceWorks team. This will be the opportunity to clarify the objectives for the feasibility study and what needs to be accomplished before the start of Phase 2. We will also discuss the four sites selected for evaluation and any previous due diligence. Based on this discussion, we will confirm the details of the scope tasks and schedule. We also want to use this first meeting to discuss the initial list of relevant examples or models to be evaluated. Following the meeting, we will prepare any revisions to the scope or schedule.

Deliverable(s):

- Finalized scope and schedule

1.2 Research Relevant Models for EXPERIENCE

The PlaceWorks team will undertake the identification and research of relevant models for EXPERIENCE. Later, in Task 4, we will delve further into these models after the program elements for EXPERIENCE have been refined. For this initial effort, we will start by identifying and researching a range of “sustainability centers” that include elements proposed for EXPERIENCE. Locally, we will look at the Resource Conservation Center in Corona, Lyle Center for Regenerative Studies in Pomona, Riverbed Farm in Anaheim, and others, highlighted below. Working with WRCOG staff, we will also identify sustainability centers to research outside the area, including both public and private examples.

Local models to evaluate include the following.

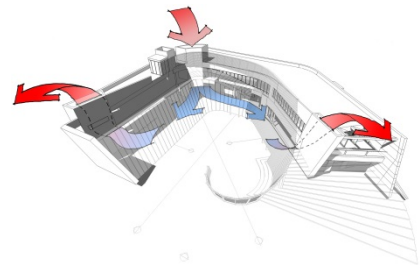
Frontier Project

The Frontier Project Foundation, a nonprofit organization founded by the Cucamonga Valley Water District, constructed the Frontier Project to demonstrate water and energy conservation strategies. HMC Architects designed the LEED Platinum demonstration facility, located in a rapidly growing suburban low-rise community in the arid climate of Rancho Cucamonga. The demonstration building—aimed at educating the public on the principles of sustainable living in Southern California—has a program with indoor and outdoor exhibition spaces, indoor and outdoor classrooms, demonstration living room, demonstration kitchen, foundation administration offices, and storage and support space.

The architecture strives to go beyond the norm of sustainable buildings—i.e., mere machines of green technologies—by combining architectural and ecological design principles as equal forces in the formation of the building. The design parti is a concentric layering of wall shells and spaces. The outer shell, constructed of insulated concrete forms, acts as a thermal mass. The second shell is a cast-in-place concrete wall that provides lateral structural integrity. The third shell, a north-facing curtain wall, maximizes diffused daylight to the interior. The inner shell is made of redwood planks salvaged from the wine vats of a local winery, and shades the south-facing wall of the office and conference wing. All these frame the xeriscape garden at the center of the site, which acts as a bioswale with cistern to collect all stormwater within the site.

Clearwater Elementary

The new Clearwater Elementary School in the Perris Elementary School District is a STEM (science, technology, engineering, and math) school designed by HMC Architects. Although an elementary school, it features similar building blocks to EXPERIENCE and is aimed at delivering 21st-century learning environments embraced by regenerative strategies. Clearwater is a collaboration-inspired campus offering group collaboration spaces, connected indoor and outdoor teaching



spaces, and large areas of shade and covered space to enable utilization of outdoor space in Riverside's arid climate. Flexible and dynamic event spaces are at the heart of the campus connected to a sunken outdoor classroom, which effectively doubles the size of the learning environment.



A community garden, cisterns, and raised planter beds expand social interaction and farm-to-table learning environments. The 14-acre site is a carefully choreographed groundwater revitalization mechanism aimed at recharging the Santa Ana Watershed using bioswales, bioretention ponds, and rain gardens. HMC Architects wrote and secured a \$1 million grant from the State Water Resources Control Board to support stormwater and water conservation strategies at the new campus. Perris Elementary USD was one of 29 recipients of the Drought Response Outreach Program for Schools (DROPS) Grant.

Woodcrest Library



Woodcrest Library is Riverside's first LEED-certified building, with public meeting rooms, offices, outdoor gathering spaces sheltered by covered walkways, and an extensive water-wise demonstration garden. The library couples the site's unique ecological setting of the natural arroyo with outdoor reading spaces to create a model of sustainable development.

The water-wise garden's indigenous and adaptive plants require little water once they are established. Native boulders are clustered to create seating areas where visiting groups can learn about water conservation and the appreciation of natural resources. The expansive use of decomposed granite stabilized with psyllium husk creates a stormwater-permeable surface to allow the natural return of water to aquifers. The south elevation of the building is protected from solar heat gain by trellises composed of wood certified by the Forest Stewardship Council. These solar-shading devices, used in combination with light-colored paving materials, reduce the heat island effect.

Alegría Fresh Farm

Alegría Fresh in Irvine is a zero-waste, solar-powered, high-performance urban microfarm of one acre that uses hydro-organic and hybrid soil-based growing systems. This "tractorless" farming creates an optimal soil biology that grows superior, nutrient-dense vegetables, salad greens, fruits, flowers, and medicinal herbs. Alegría's Green Farmacy grows more than 80 heart-healthy cultivars using the most resource-efficient processes and up to 90 percent less water, 50 percent less fertilizer, 90 percent less energy, and 70 percent less land than conventional farming. To maximize freshness, Alegría produce is delivered locally within an hour of harvest, ensuring optimum flavor, texture, and nutrition while reducing environmental impacts from transporting produce across continents.

Riverbed Farm

In a unique partnership with the city of Anaheim and Renewable Farms, Riverbed Farm is an excellent example of an aquaponic farm. Located in a one-acre, city-owned site near downtown, Riverbed Farm is a self-sustaining operation that provides education programs for schools, food for local food banks, food for several restaurants in the area, and doubles as an event venue.

Urban Produce

Urban Produce is in a business park in Irvine. They have a patented indoor growing facility that continues to test and refine indoor technology for growing leafy vegetables. Their 5,000-square-foot, high-tech growing area produces as much as 16 acres of farmland. They are pushing the envelope of sustainability by redefining what it means to consume locally grown produce. Their goal is to bring nutrient-dense, locally grown produce to urban areas across the world.

For each of the models, we will identify:

- Sustainability features of the buildings and outdoor features
- Programming of the space, both permanent and any temporary or revolving exhibits
- Details of the facilities, such as size, flexibility, purpose of the spaces
- Who is served, dependence on volunteers, paid staff
- How initially funded
- Current business model, how maintained and operated today

The information will be compiled into a series of “cutsheets” that will be used in meetings with WRCOG and member agencies. Tours of facilities can also be arranged, if desired.

Deliverable(s):

- Summary Report of Relevant Models for EXPERIENCE

TASK 2. MEETINGS**2.1 Define Roles**

The RFP identifies two sets of meetings. One set is with WRCOG and member agencies and the other set is with committees that are responsible for the areas associated with the sustainability topics in the Sustainability Framework plan. This task involves coordinating with WRCOG staff to define the roles of each group in this project. Based on the roles, we can then finalize the schedule, number of meetings, content, and expected outcomes of the meetings.

Deliverable(s):

- Memorandum on Meeting Structure, Roles, Agendas, and Schedule of Meetings

2.2 WRCOG and Member Agency Meetings

We recommend a series of six meetings with a single group consisting of WRCOG staff and member agencies. This group would be responsible for providing input and direction at key stages of the project. Based on our scope of work, the meetings would generally cover the topics below.

- **Meeting #1.** Input on the vision for EXPERIENCE; identify project considerations, potential issues and concerns; present findings on similar facilities
- **Meeting #2.** Q&A with other facility operators/managers (Frontier Project, Lyle Center, Resource Conservation Center, etc.)
- **Meeting #3.** Selection of program elements to be evaluated in the feasibility analysis; discussion of values or outcomes for evaluating the alternatives
- **Meeting #4.** Present opportunities and constraints associated with four site and present the demand analysis
- **Meeting #5.** Present findings on alternative governance, operations, and partnership for EXPERIENCE
- **Meeting #6.** Present final recommendations and areas for further study

Deliverable(s):

- Meeting Agendas, Presentation Materials, Meeting Summaries

2.3 Committee Meetings

The PlaceWorks team will conduct up to three meetings with the WRCOG subcommittees to inform and gather their input related to their particular areas of focus. It may be desirable to bring the committees together for meetings so that the discussions and findings can be heard by all at the same time.

Deliverable(s):

- Meeting Agendas, Presentation Materials, Meeting Summaries

TASK 3. SELECTION OF PROGRAM ELEMENTS

To conduct a feasibility analysis on the four sites, we will need to define all the elements and programs to be included at the facility. Drawing from the input received during Meeting #3, above, we will coordinate with WRCOG staff to select the program elements for further study in Tasks 4 and 5. Program elements will include information about minimum space sizes and capacities, need for flexibility in space design, energy conservation strategies, resilience, and third-party green-building certification.

Eco-charrette OPTIONAL TASK

As an optional task, we could conduct an eco-charrette with all the involved individuals and engage them in the process of developing a consensus around the program elements and evaluating site design options.



An eco-charrette is a collaborative and interactive workshop leading to sustainable development and regenerative futures. It offers a unique opportunity for key stakeholders, city officials, and community members to voice their visions and goals and establish the building blocks of EXPERIENCE. The eco-charrette is organized into three sessions: visioning, bioclimatic design influencers, and pathways to regenerative development.

The visioning session commences with a brief introduction of the six interrelated components that are vital to the premier quality of life in Western Riverside County that will serve as a building block to the eco-charrette. Participants share their visions for EXPERIENCE and explain how their views support a flexible and dynamic sustainability campus.

Bioclimatic design influencers are introduced as collaborators that inform the design process. Each site presents a unique micro-environment of bioclimatic influencers that can pivot sun, wind, light, rain, and ecology to create thriving opportunities for indoor and outdoor multi-generational learning and a sustainable campus that uses zero fossil fuels.

The last part of the eco-charrette aims to explore pathways to regenerative development through a team-building exercise. In groups of 5 to 8 people, the teams are dealt a series of sustainable strategy flashcards that challenge them to explore the integration of various strategies, ranging from geothermal to cool towners to outdoor learning environments.



Deliverable(s):

- Memorandum on Program Elements for EXPERIENCE

TASK 4. DEMAND ANALYSIS FOR CENTER AND PROGRAM ELEMENTS

The demand analysis will focus on two complementary demand issues. The first is the competitive supply and the second is the financial underpinnings.

The competitive supply analysis will identify similar existing installations in Western Riverside County and adjacent areas in San Diego, Orange, Los Angeles, and San Bernardino counties for the program elements defined in Task 3. We will build on the research conducted during task 1.2 that identified local relevant models. This analysis will describe the current usage/occupancy of program elements that lend themselves to quantification, such as conference centers, when such data is available or can be obtained from the existing installations. For other program elements, we will describe the building square footage or acreage associated with existing installations. For each program element, the competitive supply analysis will calculate an existing regional demand based on a relevant measure, such as acres per capita, and apply that demand for the WRCOG region.

The financial underpinnings analysis will describe the financial characteristics of select existing installations similar to EXPERIENCE. These characteristics may include development costs, ongoing operation costs, user fees, and other revenue sources. The extent of the financial underpinnings analysis will depend on the availability of data. Some financial data may be presented as ranges if necessary to protect confidentiality. The intent of this analysis is to provide a rough order of magnitude assessment to inform WRCOG's future planning and decision-making.

We will prepare a draft Demand Analysis report and submit it in a digital format. We will present the draft report at WRCOG and Member Agency Meeting #4 (see Task 1.2). Based on the discussion at the meeting and one round of consolidated comments, we will prepare a final Demand Analysis Report, which will be included in the final Feasibility Study Report.

Deliverable(s):

- Draft and Final Demand Analysis Report

TASK 5. CONCEPTUAL SITE PLANNING AND FEASIBILITY ANALYSIS (APPLIES TO THE FOUR SITES)

We propose a four-step planning process that provides a logical sequence for developing our collective understanding of EXPERIENCE and the unique goals and needs of each site, exploring a range of innovative options, and developing recommendations for review and consideration.

5.1 Discover

A high-level assessment of the physical and environmental conditions will be mapped for each site to the extent applicable. These attributes will fold into the planning process as vital influencers that shape indoor and outdoor spaces, so that they complement the needs of the region with an architectural solution that enhances the quality of life and wellness and promotes regenerative futures.

- Topography. Mapping any potential building constraints.
- Ecology and biology. A general biological survey of the site to identify any potential habitat for threatened, endangered, or otherwise sensitive species or habitats.
- Bioclimatic analysis. Explores how the environment informs the planning process.
- Views and access to daylight, both on- and off-site views.
- Renewable energy options.
- Ingress and egress options.
- Surrounding land use, local context, and zoning regulations.
- Acoustic considerations.
- Prevailing winds.

- Hazardous materials. An environmental screening assessment based on an evaluation of historical land uses and the potential for past contamination at the site. (WROG staff to research available data, with peer review by PlaceWorks)
- Encumbrances. Consultation with utility agencies regarding aboveground and underground utilities (WRCOG staff to lead this)

Our team will synthesize the physical and environmental conditions and meet with key personnel to build a comprehensive understanding of each unique site. The information will be synthesized into an opportunities and constraints map for each site.

Deliverable(s):

- Series of Existing Conditions Maps, Opportunities and Constraints Maps

5.2 Synthesize

Drawing from the work above, our internal team will conduct an all-day charrette to developing “bubble-level” site planning concepts for each site. The concepts will identify the most suitable locations for buildings, outdoor uses, and parking. Our analysis will include vehicular and pedestrian circulation patterns, architectural and landscape character, adjacent land uses, functional zoning, utilization and adequacy of space, and utility infrastructure needs. We will also develop the *big ideas* related to urban design and placemaking. WRCOG staff will be invited to join us near the end of the day so that we can present our findings and recommendations. Based on the dialogue with WRCOG staff, we will refine the concepts for presentation in Meeting #5 (Task 2.2).

Deliverable(s):

- Conceptual Site Plans for Four Sites

5.3 Sustainable Economics

Providing a rough order of magnitude (ROM) is one of the primary functions of an architect. Excellent design is not solely dependent on financial resources, but budget is a real design tool in terms of decision making. The very real economic constraints of a project can often lead to more creative solutions, and we will utilize an innovative cost modeling approach on the EXPERIENCE project.

A ROM will be tailored to the scope and program defined through the WRCOG and Member Agency Meetings and planning efforts. The ROM will build on current construction cost trends and apply historical data of subject matter relevance similar to EXPERIENCE. The Frontier Project, Clearwater, and HMC’s zero-net-energy experience and expertise in building high performance architecture throughout Southern California will give decision-makers the necessary information to move forward.

Developing the ROM is an estimation of a project's cost to complete based on broadly defined planning documents, anticipated program areas, adjacency diagrams, and site features. While the variance in an ROM can be large, the purpose is to set the stage for Phase 2 and provide a platform of greater detail. In addition to capital costs, our team will also evaluate ROM costs for operations and revenue.

Deliverable(s):

- Rough Order of Magnitude Cost Modelling for EXPERIENCE

5.4 Evaluation Process

There are many factors that will influence the site selection process. These include the final programming recommendations, the physical opportunities and constraints, the pros and cons associated with the demand analysis, the results of the site planning scenarios, cost differentials, and broader political considerations. During this task, we will work closely with WRCOG staff to define the evaluation process and how structured it needs to be. The evaluation process is expected to include a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis for each site. In addition, the goals and objectives identified early on by staff and member agencies would be used as evaluation criteria for each of the sites and the program overall. The evaluation criteria could also be weighted for the ranking process, to achieve a final ranking between sites. The evaluation criteria and weighting would be developed during one of the meetings with WRCOG and member agencies.

Deliverable(s):

- Evaluation Matrix/SWOT Analysis

5.5 Governance, Operations, and Partnership Evaluation

The right governance, operations and partnerships are critical to the success of EXPERIENCE. In this additional task, we will explore potential governance and operational structure and partnership opportunities in more detail. We will identify and define between 3 and 5 alternatives for governance structure, based upon multiple factors including:

- Understanding of the Center's objectives;
- Potential partners and their relative mission alignment;
- Formulating partnership structures; and
- Comparable case studies

Develop a list of evaluation criteria for the alternatives, based upon our understanding of your goals and parameters. For each of the alternatives, we will conduct a strategic evaluation of strengths, opportunities, challenges, and risks. We will also review and gather input on the alternatives during a WRCOG and

Member Agency Meeting. Based on this analysis and input received, we will recommend one or two alternatives and conduct additional financial and strategic governance analysis for the selected alternative(s).

Deliverable(s):

- Draft and Final Governance, Operations and Partnership Evaluation Memo

TASK 6. FINAL FEASIBILITY RECOMMENDATIONS

The above work tasks would be summarized in a final feasibility report. The report would include vignettes of the preferred site plan and program elements, which could be used in marketing materials for later phases. The report would identify any further due diligence required on the site(s) as well as any further research needed on sustainable technologies. We will also identify next steps, such as fundraising strategies, and outreach support. The final report would be presented to the WRCOG Executive Committee for approval.

Deliverable(s):

- Draft and Final Feasibility Report

QUALITY, BUDGET AND SCHEDULE CONTROL

QUALITY ASSURANCE PLAN

PlaceWorks prides itself on its high-quality work products and recognizes the role that this quality plays in securing repeat business. Elements of our Quality Assurance/Quality Control (QA/QC) program are described below:

Personnel and Responsibilities

For most projects, associate level staff members compile and sort data, perform routine field activities, and prepare initial drafts of documents. This is both cost-effective for the client and provides necessary training and experience for our staff. To ensure the success of this approach, however, our project managers stay involved with the project and carefully review all work products, including administrative drafts, before they are transmitted for review. Documents also undergo review by one of the company's principals as part of the PlaceWorks commitment to quality. Even in this day and age of sophisticated computer spell- and grammar-checking, we firmly believe that there is no substitute for a thorough "hands-on" review.

Preparation of Documents

PlaceWorks understands the importance of complete, reader-friendly, technically accurate work products. Before finalization, all documents are submitted to the firm's word processing and editing team, which is responsible for putting the document into a standard or custom format (depending on the project) and performing a series of systematic checks on the document (e.g., spell-check,

headers/footers, table of contents). The document is then sent to a technical editor, who reviews it for consistency, readability, grammar, and graphics or typographical errors. After these issues have been corrected, the document is reviewed by another senior project manager or one of the firm's principals.

BUDGET AND SCHEDULE CONTROL

Schedule Control

Communication is the best means of ensuring that programs remain on task and on schedule. Each program usually has milestones and waypoints that must be met. PlaceWorks schedules regular conference calls and GoToMeeting events to allow rapid and frequent checks on progress. While technology is helpful, regularly scheduled in-person meetings are also valuable to foster solution building and information exchange. Typically, we schedule in-person meetings around other required meetings to reduce cost.

If the schedule starts to slip, we first try and determine the reason. If it is a staff resources issue we can bring more staff into the project to meet the requirement. If the issue is outside of our control, then finding out early can help in developing solutions to getting things back on track. Ultimately it comes back to communication and making sure all program participants are aware of the schedule and commitment.

PlaceWorks managers regularly meet and apprise each other of project status, milestones, budgets, and schedule. For each program both Karen Gulley, the Principal in Charge, as well as Tammy Seale, Project Manager, will be equally informed. The PlaceWorks approach ensures that either manager can assist to help keep to the schedule.

Budget and Funding Requirements

PlaceWorks prepares invoices detailed to billing codes and based on task orders, work authorizations, and funding sources. New programs often have requirements essential to the funding. It is imperative that the project manager understand and convey the funding requirements to the billing staff and others who may work within or benefit from the program. If needed to meet the needs of the program, PlaceWorks will prepare a summary of the requirements and provide training to others who may provide invoices, billings, or receive payment from the program.

POTENTIAL ISSUES OR RISKS

The following potential issues could come up during the project, and we have anticipated them in our scope of work.

- It is expected that many of the cities will want the center located near them. To engage in a more objective discussion about the pros/cons associated with the

location of each site, we proposed a competitive supply analysis of similar program elements in or around Western Riverside County.

- Selection of the program elements would be difficult without understanding high-level costs associated with the indoor/outdoor facilities. Therefore, we have included rough order of magnitude cost estimates as part of our scope.
- We anticipate a wide range of ideas, hopes, and dreams for EXPERIENCE. In order to have meaningful conversations about the options, we have brought together a group of advisors that are involved in either designing or running similar facilities and programs and who can answer detailed questions.

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Detailed and Itemized Pricing

The budget on the following page is an estimate based on our understanding of your goals for the feasibility study for EXPERIENCE. It does not include the budgets for the optional tasks described in the Scope of Work. As noted previously, we welcome the opportunity to discuss and refine the budget.

The tables below provides our 2017 Standard Fee Schedules. These schedules support our detailed budgets for selected tasks.

PlaceWorks – 2017 Standard Fee Schedule

Staff Level	Hourly Bill Rate
Principal	\$210-\$325
Associate Principal	\$190-\$225
Senior Associate/Senior Scientist	\$160-\$200
Associate/Scientist	\$120-\$170
Project Planner/Project Scientist	\$95-\$125
Planner/Assistant Scientist	\$85-\$100
Graphics Specialist	\$65-\$135
Clerical/Word Processing	\$45-\$160
Intern	\$65-\$85

Subconsultants are billed at cost plus 10%.

Mileage reimbursement rate is the standard IRS-approved rate.

HMC - Rates Schedule by Professional Category

Staff Level	Hourly Bill Rate
Principal in Charge	\$210
Project Director/Executive	\$190
Project Leader/Technical Leader	\$140
Sr. Project Manager	\$195
Sr. Project Architect/ QA Architect	\$195
Sr. Technical Manager	\$195
Project Manager	\$160
Project Architect	\$160
Technical Manager	\$160
Project Coordinator	\$120
Intermediate Drafter	\$105
Sr. Construction Administrator	\$200
Construction Administrator	\$140
Construction Administration Support	\$80
Design Director	\$225
Design Leader	\$120
Project Designer	\$150
Senior Project Designer	\$175
Designer II	\$110
Designer	\$85
Senior Interior Project Designer	\$165
Senior Interior Designer	\$170
Interior Design Coordinator	\$90
Interior Design Leader	\$115
Interior Designer	\$125
Sustainable Design	\$140
Cost Estimating	\$190
Specifications	\$170
Agency Compliance	\$90

These are the current hourly rates effective June 1, 2016 through June 30, 2017 and are subject to change one time annually effective June 1st.

The expenses below are not included in the design and construction administration fees, and are typically billed directly to the client:

- Reproduction or reprographic expenses requested by the client or governing agencies. (Expenses related to architect's internal use and coordination with consulting engineers are included and are not considered as reimbursable expenses.).
- Shipping expenses requested by the client or governing agencies

THE PLACEWORKS TEAM

RFP 17-08: On-Call Planning Services for the Western Riverside Council of Governments

COST PROPOSAL: DISCIPLINE D. GENERAL PLAN / SUSTAINABILITY SUPPORT - EXPERIENCE FEASIBILITY STUDY

Task	Description	Title:	PLACEWORKS												PlaceWorks Hours	PlaceWorks Labor Total	HMC			
			GULLEY	SEALE	KRISPI	SUNDBERG	JUDD	SUTTON	FLEISCHMANN		GUNNELLS		CLENDENING	FROELICH			WP/ CLERICAL	Architect	TOTAL TASK BUDGET	
			Principal-in- Charge and PM	Overall Project Manager				Landscape Architect	Landscape Architect	Designer	Economist		Senior Scientist	Technical Editor						
																	Principal/VP			Associate Principal
Hourly Rate:			\$215	\$215	\$140	\$160	\$225	\$210	\$160	\$105	\$215	\$145	\$180	\$110	\$85					
TASK 1. PROJECT INITIATION																				
1.1	Kick-Off with WRCOG Staff		8							4	4					16	\$3,000	4,400	\$7,840	
1.2	Research Relevant Models		16					8	20	40						84	\$12,520	6,600	\$19,780	
1.3	Project Management		24													24	\$5,160		\$5,160	
	Task 1. Subtotal		48	0	0	0	0	8	20	44	4	0	0	0	0	124	\$20,680	\$12,100	\$32,780	
TASK 2. Meetings																				
2.1	Define Roles		8													8	\$1,720		\$1,720	
2.2	WRCOG and Member Agency Meetings (5)		50					8	8	50	20					136	\$23,260	8,880	\$33,028	
2.3	Committee Meetings (3)		20						8	8						36	\$6,420	6,660	\$13,746	
	Task 2. Subtotal		78	0	0	0	0	8	16	58	20	0	0	0	0	180	\$31,400	\$17,094	\$48,494	
TASK 3. Selection of Program Elements																				
3.1	Selection of Program Elements		16					16	24							56	\$10,640	8,960	\$20,496	
	Task 3. Subtotal		16	0	0	0	0	16	24	0	0	0	0	0	0	56	\$10,640	\$9,856	\$20,496	
TASK 4. Demand Analysis for Center and Program Elements																				
4.1	Demand Analysis for Center and Program Elements		8							32	70	16			6	132	\$22,960		\$22,960	
	Task 4. Subtotal		8	0	0	0	0	0	0	32	70	16	0	0	6	132	\$22,960	\$0	\$22,960	
TASK 5. Conceptual Site Planning and Feasibility Analysis																				
5.1	Discover		24						24	40		24	8			120	\$18,120	8,040	\$26,964	
5.2	Synthesize		16					8	64	16						104	\$17,040	7,320	\$25,092	
5.3	Sustainable Economics		4					8	24							36	\$6,380	12,560	\$20,196	
5.4	Evaluation Process		24							20	8					52	\$8,980	5,120	\$14,612	
5.5	Governance, Operations and Partnership Eval		27								40					67	\$14,405		\$14,405	
	Task 5. Subtotal		95	0	0	0	0	16	112	76	48	24	8	0	0	379	\$64,925	\$36,344	\$101,269	
TASK 6. Final Feasibility Recommendations																				
6.1	Draft and Final Report		24						24	40						88	\$13,200	7,840	\$21,824	
	Task 6. Subtotal		24	0	0	0	0	0	24	40	0	0	0	0	0	88	\$13,200	\$8,624	\$21,824	
Labor Hours Total			269	0	0	0	0	48	196	250	142	40	8	0	6	959	\$163,805	\$84,018	\$247,823	
Labor Dollars Total			\$57,835	\$0	\$0	\$0	\$0	\$10,080	\$31,360	\$26,250	\$30,530	\$5,800	\$1,440	\$0	\$510					
PlaceWorks Percent of Total Labor			28.1%	0.0%	0.0%	0.0%	0.0%	5.0%	20.4%	26.1%	14.8%	4.2%	0.8%	0.0%	0.6%					
PlaceWorks Reimbursable Expenses																				\$2,000
GRAND TOTAL																				\$249,823

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APPENDICES



Appendix A. References

PLACEWORKS

Client Name & Project Location	Contact Name & Tel Number	Brief Project Description
ORANGE COUNTY - MCAS El Toro Base Reuse - Greenspot Development Feasibility	James Campbell, Manager OC Property Development 714.667.9673 james.campbell@ocpw.ocgov.com	PlaceWorks was retained by Orange County to develop scenarios for future reuse of several county-owned properties.
SOUTH ORANGE COUNTY COMMUNITY COLLEGE DISTRICT Advanced Technology & Education Park	John Edwards, Director of Site Development 949.348.6071 jedwards@socccd.edu	A 66-acre satellite campus designed to provide workforce development, advanced technology, and career technical education programs. Located on the former MCAS Tustin, this site was part of a 1,600-acre base reuse plan involving residential, commercial, office, and a variety of institutional land uses
SANTA CLARA COUNTY PARKS & RECREATION DISTRICT Martial Cottle Park	Jane Mark, Planning Manager, Midpeninsula Regional Open Space District (Formerly with Santa Clara County) 650.691.1200 jmark@opensapce.org	A new park on a 300-acre historic agricultural farm in southeast San Jose. PlaceWorks led a consultant team that facilitated the public and stakeholder input process and developed the design for a new park that features active agricultural uses, recreational trails and amenities, habitat enhancement, and community-serving facilities. In addition to writing the Master Plan and State Parks General Plan document for the new park, PlaceWorks completed the EIR for the project.

HMC ARCHITECTS

Client Name & Project Location	Contact Name & Tel Number	Brief Project Description
PERRIS ELEMENTARY SCHOOL DISTRICT Clearwater Elementary School	Vincent J. Ponce Superintendent 951.657.3118 vponce@perris.k12.ca.us	A new elementary school campus that includes group collaboration spaces and three outdoor classrooms complete with wet project areas, seating, and shading elements. Flexible spaces are situated in the heart of campus and connected to an outdoor sunken gathering area that is the most collaborative and sustainable campus Perris ESD has ever built.
PERRIS ELEMENTARY SCHOOL DISTRICT Clearwater Elementary School	Tina Daigneault Chief Business Official Moreno Valley Unified School District 951.571.7500 x17241 tdaigneault@mvusd.net (Formerly at Perris Elementary School District)	See above.
COUNTY OF SAN DIEGO, DEPARTMENT OF GENERAL SERVICES Health and Human Services Agency Zero Net Energy (ZNE) Facility	Thomas Alan Hoerstman Capital Projects Manager 858.694.3989 thomas.hoerstman@sdcounty.ca.gov	A new facility that implements low-impact development standards, uses sustainable design principles and practices, and is an example of high-performance architecture with minimal environmental impacts.

Appendix B. Project Team Staffing

EMPLOYEE COVERAGE LEVELS

To view the “coverage levels” or percentage of project by staff, see the line item just above Labor Hours in the cost proposal spreadsheet. This number for each staff member is the percentage of the budget the employee is expected to work. In addition, for yet-to-be-determined tasks under this support staff support services agreement, please refer to the Key Staff section under Firm Capabilities for an estimated percentage of availability per person.

FELONY CONVICTIONS

To the best of our knowledge, no employees proposed for this project have ever been convicted of a felony. A great many of our staff have had background checks conducted by the State of California as part of the fingerprinting process required for those who may visit school sites. And for the past several years, we have often requested background checks for new hires as relevant to their job duties and responsibilities. However, as of this year, it is our standard hiring procedure to request a background check for each prospective new addition prior to their employment.

STAFF RESUMES

Provided on the following pages are resumes for each key staff member.

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KAREN GULLEY

Principal

Karen has a talent for strategy and innovative problem solving that has been honed by over 25 years of experience. Her skill with all facets of community planning and design for private and public sector clients expands the opportunities for creative solutions. As Principal, she has developed a solid practice in transit-oriented development (TOD), infill development, and corridor revitalization. She specializes in assisting local communities with evaluating the potential for transit-oriented development associated with Metrolink, BRT, and urban circulation. Her work ranges from vision plans to implementation strategies, each developed in a collaborative effort with city staff, transit agencies, and the public.

Karen also has extensive experience in specific plans, conceptual design studies, infill development strategies, general plans, military base reuse plans, and project implementation and entitlement. She has developed strong capabilities in inter-governmental coordination and project management. She regularly facilitates public meetings and workshops and is adept at establishing a rapport with her audience and communicating complex and often controversial issues in a clear, accurate manner. She is an expert at developing tailored solutions in both coding and design, and she enjoys the challenges of project processing, negotiating conditions of approval, responding to political considerations, and handling communication between stakeholders.

HIGHLIGHTS OF EXPERIENCE

TRANSIT PLANNING/TRANSIT-ORIENTED DEVELOPMENT

- » Riverside Streetcar Feasibility Study | Riverside CA
- » Fullerton College Connector Study | Fullerton CA
- » CollegeTown Visioning, Specific Plan, and EIR | Fullerton CA
- » TOD Overlay District | San Bernardino CA
- » Western Riverside BRT Route Planning and Station Area Studies | Western Riverside County CA
- » TOD: visioning, planning and design, and strategic implementation projects for the cities of Corona, Perris, Riverside, Hemet, San Bernardino, Temecula, March AFB, Montclair, Fontana, Brea, Fullerton, La Habra, Placentia, and Azusa as part of SCAG's Compass Blueprint Demonstration Program
- » WRCOG Non-Motorized Transportation Plan | Western Riverside County CA
- » North Orange County Cities Go Local Program | Orange County CA

CORRIDOR PLANNING

- » Long Beach Boulevard Specific Plan | Long Beach CA
- » Harbor Boulevard Specific Plan | Santa Ana CA
- » Corridor revitalization: planning and implementation projects for the cities of Glendora, Covina, Azusa, San Dimas, Irwindale, and Chino as part of SCAG's Compass Blueprint Demonstration Program
- » Arrow Highway Corridor, Multi-Jurisdictional Planning in Corridors | San Gabriel Valley CA
- » Telegraph Corridor: Design, Land Use, & Zoning | Santa Fe Springs CA
- » I-5 Freeway Expansion Analysis, I-5 Corridor Phase One, and Freeway Overlay Zone | Santa Fe Springs CA

EDUCATION

- » BA, Economics, University of California, Santa Cruz
- » Masters Program, Urban & Regional Planning, California State Polytechnic University, Pomona (all but thesis)
- » Certificate in "Planning for Effective Public Participation," International Association for Public Participation

AFFILIATIONS

- » American Planning Association
- » Urban Land Institute

Team member since 1991

- » Life on State | Salt Lake County UT
- » Los Alamitos Corridors Plan | Los Alamitos CA

INFILL & REDEVELOPMENT

- » CollegeTown Visioning and Specific Plan | Fullerton CA
- » Southeast Area Specific Plan | Long Beach CA
- » Tustin Legacy Specific Plan Revision | Tustin CA
- » Mixed Use Overlay Zones | Anaheim CA
- » MCAS Tustin Military Base Reuse: Villages of Columbus, planning, design, and entitlement services | Tustin CA
- » Commercial Entertainment District Specific Plan & EIR | Coachella CA
- » North Hemet Specific Plan | Riverside County CA

URBAN PLANNING

- » River Ranch Community Planning & Entitlements | Madera County CA
- » Glen Helen Specific Plan | San Bernardino County CA
- » Parc Anaheim Specific Plan | Anaheim CA
- » Pinnacle at Orange Specific Plan | Orange CA
- » The Preserve Specific Plan | Chino CA

COMPREHENSIVE PLANNING

- » WRCOG Sustainability Plan Framework | Western Riverside County CA
- » Rancho Cucamonga General Plan Update and EIR | Rancho Cucamonga CA
- » Economic Development Strategic Plan | San Bernardino County CA
- » Fontana General Plan Update & Zoning Code Consistency Program | Fontana CA
- » Temecula Inaugural General Plan Update and EIR | Temecula CA

LARGE-SCALE LAND PLANNING

- » Kennecott Master Plan | Salt Lake County UT
- » Centennial Specific Plan, Tejon Ranch | Los Angeles County CA
- » Collier Strategic Plan | Collier County FL
- » Ferber Ranch Area Plan & Entitlements | Orange County CA
- » Hawadi Master Plan | Saudi Arabia

PLAN IMPLEMENTATION

- » Tustin Legacy Master Developer | Tustin and Irvine CA
- » Villages of Columbus Planning & Entitlements, MCAS Tustin | Tustin CA
- » Heritage Fields Development Plan Environmental Review | Irvine CA
- » IBC Residential Development Strategy and Ordinance | Irvine CA
- » Villages at Cabrillo Master Plan Outreach & Entitlements | Long Beach CA

ARTICLES

- » “Repositioning Urban Corridors to Attract New Residential and Commercial Markets,” Urban Land, 2010
- » “Sowing the Seeds of Regional Planning,” Urban Land, 2007
- » “Reshaping the American Commercial Strip,” Urban Design Group Journal, Winter 2003

AWARDS

- » 2015 Transportation Planning Award of Merit, APACA Orange Section | Fullerton College Connector (Streetcar) Study)
- » 2013 Best of the Best Award, ULI Orange County/Inland Empire | WRCOG Sustainability Framework
- » 2009 Compass Blueprint Achievement Award in Prosperity, SCAG | Coachella’s South East SOI Sustainability Project
- » 2006 Outstanding Planning Award for Planning Implementation—Large Jurisdiction, APACA Inland Empire Section | Glen Helen Specific Plan

KAREN GULLEY

Principal

kgulley@placeworks.com



TAMMY L. SEALE

Associate Principal

Tammy Seale is a leader in the field of sustainability and climate change services, working to inform and expand the practice. As an environmental planner for more than 20 years, she is committed to working with communities to identify and implement local strategies to address climate change. She prepares local sustainability, climate, and energy action plans; greenhouse gas emissions inventories; GHG analysis for CEQA documents; general plan elements; and policy documents to address local sustainability, climate change, and energy programs.

Tammy is a frequent presenter and workshop participant at conferences and special lectures and pursues research, publication, and curriculum development focused on local climate action planning. She is a member of the Association of Environmental Professionals (AEP) Climate Change Committee and has contributed to committee white papers. She is co-author of *Local Climate Action Planning*, the first guidebook for climate action plans to address GHG emissions reductions and climate change adaptation.

PRIOR EXPERIENCE

CLIMATE ACTION PLANS

- » Benicia
- » Butte County
- » Calimesa
- » Contra Costa County
- » Laguna Woods
- » Lancaster
- » Novato
- » San Carlos
- » San Luis Obispo
- » San Mateo
- » Santa Clara
- » Seal Beach
- » Sunnyvale
- » Tulare
- » Walnut Creek

OTHER PROJECTS

- » San Gabriel Valley COG Energy Efficiency and Climate Action Plan (included Energy Action Plans for 27 cities) | San Gabriel Valley CA
- » Santa Barbara County Energy and Climate Action Plan | Santa Barbara County CA
- » Western Riverside COG Subregional Climate Action Plan Implementation and Adaptation Plan | Western Riverside County CA
- » San Mateo County Energy Efficiency and Climate Action Plan | San Mateo County CA
- » Elk Grove Climate Action Plan and Sustainability Element | Elk Grove CA
- » Huntington Beach Qualified GHG Reduction Strategy and Coastal Resiliency Plan | Huntington Beach CA
- » Palmdale Energy Action Plan | Palmdale CA
- » San Bernardino County Renewable Energy and Conservation Element | San Bernardino County CA
- » Downtown Concept Plan | San Luis Obispo CA
- » County of San Luis Obispo EnergyWise Plan | San Luis Obispo County CA
- » Guidance on Developing Qualified GHG Reduction Strategies | Bay Area Air Quality Management District, San Francisco CA
- » Municipal Operations and Community-wide GHG Emissions Baseline Inventories for the cities of Arroyo Grande, Atascadero, Grover Beach, Morro Bay, Paso Robles, Pismo Beach, and San Luis Obispo | San Luis Obispo Air Pollution Control District
- » Milpitas Qualified Greenhouse Gas Reduction Plan | Milpitas CA
- » Inyo County Multi-jurisdictional Hazard Mitigation Plan | Inyo County CA
- » Madera Parks and Recreation Master Plan | Madera CA
- » Plan Morro Bay | Morro Bay CA

EDUCATION

- » MSP, Urban and Regional Planning, Florida State University, Tallahassee
- » BA, Environmental Conservation, University of Colorado, Boulder

AFFILIATIONS

- » American Planning Association
- » California Planning Foundation, Board of Directors
- » Association of Environmental Professionals
- » AEP Climate Change Committee

Team member since 2017

TAMMY L. SEALE
Associate Principal
tseale@placeworks.com

PUBLICATIONS

- » Boswell, Michael R. and Tammy L. Seale. "Introduction to Climate Action Planning." "Greenhouse Gas Emissions Accounting for Cities." "Creating a Low-Carbon, Resilient City." Planetizen Courses, 2016.
- » Tammy L. Seale, contributing author. *Guiding Principles for City Climate Action Planning*. United Nations Human Settlements Programme (UN-HABITAT), 2015.
- » Boswell, Michael R., Adrienne I. Greve, and Tammy L. Seale. "Climate Change Planning." In *Elgar Companion to Sustainable Cities: Strategies, Methods and Outlook*, edited by D. Mazmanian and H. Blanco, 302–319. Northampton, MA: Edward Elgar Publishing, 2014.
- » Boswell, Michael R., Adrienne I. Greve, and Tammy L. Seale. *Local Climate Action Planning*. Washington, DC: Island Press, 2012.
- » Tammy L. Seale, principal author. "Forecasting Community-wide Greenhouse Gas Emissions and Setting Reduction Targets." California Association of Environmental Professionals (CAEP), May 2012.
- » Tammy L. Seale, contributing author. "Community-wide Greenhouse Gas Baseline Inventory White Paper." CAEP, March 2011.
- » Boswell, Michael R., Adrienne I. Greve, and Tammy L. Seale. "Climate Action Planning Is Good Planning." *Florida Planning*, Summer 2012, 6-7.

AWARDS

- » 2016 Environmental Resource Document Merit Awards, California AEP and APACA, Central Coast Section | San Luis Obispo (SLO) County Renewable Energy Streamlining Program
- » 2013 Innovation in Green Community Planning Awards, APA California Chapter and APACA, Central Coast Section | City of San Luis Obispo Climate Action Plan
- » 2012 Innovation in Green Community Planning Award, APACA, Central Coast Section | SLO County EnergyWise Plan
- » 2012 Energy Efficiency Project Merit Award, *Climate Change Business Journal* | San Gabriel Valley Council of Governments Energy Efficiency Climate Action Plan
- » 2011 Project of the Year: Creative and Innovative Category, Southern California American Public Works Association | Palmdale Energy Action Plan
- » 2010 Award for Business Achievement in New Practice Area: Sustainability & Climate Change Services, *Environmental Business Journal*

SPEAKING ENGAGEMENTS & TEACHING

- » "The Future of Streets: Hacking Streetmix for Community-Based Outreach" | 2016 Code for America Summit | Oakland CA
- » "Implementing a Renewable Energy Strategy in California" | 2016 State Conference, APA California | Pasadena CA
- » "City Climate Action and Resiliency Planning" | 2015 National Planning Conference, American Planning Association | Seattle WA
- » "The Idiot's Guide to Climate Action Planning" | 2013 Joint Conference, National AEP and California AEP | Los Angeles CA
- » "Tools of Engagement: Technology and Techniques to Engage Your Community in Sustainability Planning Efforts" & "Collaborative Sustainability Efforts in Southern California" | 2013 Joint Conference, National AEP and AEP | Los Angeles CA
- » "Break Out the Crystal Ball: Community-wide GHG Emissions Forecasts and Targets" 2012 AEP Annual Conference | Sacramento CA & Rancho Mirage CA
- » "Sustainable Synergies: Funding, Implementing, and Monitoring Your Climate Action Plan" 2012 AEP Annual Conference | Sacramento CA
- » "Going Green When You're in the Red: Sustainability on a Budget" | 2011 State Conference, APA California | Santa Barbara CA
- » "Climate Action Planning" | 2011 Speaker Series, APACA, Central Coast Section | Santa Barbara CA
- » "Local Level Climate Action Planning for Agriculture" | 2011 Forum on Extreme Climate Risks and California's Future Agriculture and the Food System | Sacramento CA



ELI KRISPI

Associate

Eli Krispi works on planning projects to reduce environmental impacts and increase resiliency to a changing climate. As a planning and sustainability professional, he draws on experience implementing sustainable policies, a science-based education focused on the nexus of the built environment and the natural world, and a data-driven analytical approach to problem solving. Eli's work includes energy and climate action plans, climate adaptation and hazard plans, general and specific plans, and renewable energy strategies.

PRIOR EXPERIENCE

CLIMATE ACTION PLANNING AND IMPLEMENTATION

- » Butte County Climate Action Plan, Butte County CA
- » Contra Costa County Climate Action Plan, Contra Costa County CA
- » Lancaster Climate Action Plan, Lancaster CA
- » Merced Programmatic Climate Action Plan, Merced CA
- » Mono County Resource Efficiency Plan, Mono County CA
- » San Bernardino County Renewable Energy Element, San Bernardino County CA
- » San Gabriel Valley Council of Governments Energy Action Plans, San Gabriel Valley CA
- » San Luis Obispo County Renewable Energy Streamlining Program, San Luis Obispo County, CA
- » San Mateo Climate Action Plan, San Mateo CA
- » Seal Beach Climate Action Plan, Seal Beach CA
- » Sunnyvale Climate Action Plan Implementation Monitoring, Sunnyvale CA
- » Walnut Creek Climate Action Plan Implementation Monitoring and Assessment Reports, Walnut Creek CA

CLIMATE ADAPTATION, RESILIENCY, AND HAZARD MITIGATION PLANNING

- » Local Government Hazard Resiliency Toolkit for FEMA Region IV, FEMA
- » Achieving Element S4, Technical Guidance for FEMA Region VIII, FEMA
- » Huntington Beach Local Hazard Mitigation Plan, Huntington Beach CA
- » Inyo County Multijurisdictional Hazard Mitigation Plan, Inyo County CA
- » Laguna Woods Climate Adaptation Plan, Laguna Woods CA Western Riverside Council of Governments Adaptation and Resiliency Strategy, Riverside County CA
- » Santa Clara Valley Water District Local Hazard Mitigation Plan, Santa Clara County CA
- » Santa Rosa Local Hazard Mitigation Plan, Santa Rosa CA
- » Seal Beach Emergency Operations Plan, Seal Beach CA
- » South Gate Local Hazard Mitigation Plan and Safety Element, South Gate CA
- » Torrance Local Hazard Mitigation Plan, Torrance CA
- » Town of Windsor Local Hazard Mitigation Plan, Windsor CA

COMPREHENSIVE PLANNING

- » Elk Grove General Plan, Elk Grove CA
- » Huntington Beach General Plan, Huntington Beach CA
- » Plan Morro Bay, Morro Bay CA
- » San Bernardino County Community Planning Continuum, San Bernardino County CA

EDUCATION

- » Master of City and Regional Planning, California Polytechnic State University, San Luis Obispo
- » Bachelor of Arts, Geography, Environmental Studies, University of California, Santa Barbara

CERTIFICATIONS

- » Certified City Climate Planner, Greenhouse Gas Emissions Inventory Specialist
- » Certified FEMA Plan Reviewer for Local Mitigation Plans (IS-00328)

AFFILIATIONS

- » American Planning Association
- » SPUR Association

Team member since 2017

ELI KRISPI**Associate**

ekrispi@placeworks.com

SPEAKING ENGAGEMENTS

- » Planning-Related Environmental Engagement for Students and Professionals, Seminar on Environmental Careers, University of California Santa Barbara, February 2017
- » Understanding and Reporting Natural Resource Use of Buildings, California Higher Education Sustainability Conference, June 2011
- » Implementing Sustainability in the University and Business Communities, This Way To Sustainability, November 2010
- » Waste Management Measuring and Reporting, California Higher Education Sustainability Conference, July 2010
- » Student-Led Office and Building Greening Programs, California Higher Education Sustainability Conference, June 2009
- » Waste Audit Workshop, California Higher Education Sustainability Conference, June 2009
- » Reaching Zero Waste, California Higher Education Sustainability Conference, June 2008



SUZANNE SCHWAB, AICP

Associate

Suzanne combines her experience as a designer, researcher, and writer with a practical approach and an emphasis on the end user. Her planning documents are user friendly and reflect her creative problem-solving skills. Suzanne has assisted on variety of comprehensive planning efforts, including the update to the Marine Core Air Station Tustin Specific Plan, Southeast Area Development and Improvement Specific Plan Update for the City of Long Beach, the Town of Yucca Valley's General Plan and the Sustainability Framework for Western Riverside County. Her focused planning experience includes work on housing elements as well as corridor, site, and specific plans.

Before joining PlaceWorks, Suzanne gained valuable experience in the public planning sector at the City of Tustin, City of Anaheim, and County of Orange. She updated and created design guidelines for Tustin's Old Town district and First Street. She was an integral part of the City of Anaheim team that created a new specific plan for Anaheim Canyon.

An active member of the Orange Section of the American Planning Association, Suzanne has served on the section board since 2011 as co-chair of awards and as a member of 2014 State Conference Planning Committee. She is also involved with the Urban Land Institute Orange County/Inland Empire Section and has served on the Places of Commerce Initiative Council.

HIGHLIGHTS OF EXPERIENCE

GENERAL PLANS

- » Yucca Valley General Plan | Yucca Valley CA
- » Irvine General Plan | Irvine CA

SPECIFIC PLANS

- » Southeast Area Specific Plan (SEADIP) | Long Beach CA
- » Centennial Specific Plan | Antelope Valley, Los Angeles County CA
- » Goodman Commerce Center Eastvale Specific Plan | Eastvale CA
- » Mill Creek, Update to The Preserve Specific Plan | Chino CA
- » Tustin Legacy Specific Plan (formerly MCAS Tustin Specific Plan) | Tustin CA

CORRIDOR PLANS

- » Beach Boulevard Corridor Specific Plan | Anaheim CA
- » Midtown Specific Plan | Long Beach CA
- » Harbor Corridor Specific Plan | Santa Ana CA

HOUSING ELEMENTS

- » Santa Ana Housing Element | Santa Ana CA
- » Yucca Valley Housing Element | Yucca Valley CA
- » Dana Point Housing Element | Dana Point CA
- » Stanton Housing Element | Stanton CA

OTHER

- » Riverside Reconnects, Street Car Feasibility Study | Riverside CA
- » Site Planning for Tustin Legacy, MCAS Reuse | Tustin CA
- » WRCOG Sustainability Framework Plan | Riverside County CA

EDUCATION

- » MA, Urban and Regional Planning, University of California, Irvine
- » BS, Marketing and International Studies, Indiana University, Bloomington

CERTIFICATIONS

- » American Institute of Certified Planners

AFFILIATIONS

- » American Planning Association
- » Urban Land Institute

Team member since 2012



SUZANNE SCHWAB

Associate

sschwab@placeworks.com

AWARDS

- » Urban Land Institute Emergent Leadership Award for Planning, 2014 | Orange County/Inland Empire Section
- » Outstanding Student Achievement Award, Planning, Policy, and Design Program, UC Irvine, 2012
- » Fellowship Recipient, California Planning Foundation, 2012

ACTIVITIES

- » Awards Co-chair, American Planning Association Orange Section, 2011–2014
- » Places of Commerce Initiative Council, OC/IE Urban Land Institute, 2011–2012



MATT GELBMAN, AICP

Associate Planner

Matt has more than seven years' experience working on a range of comprehensive planning projects throughout southern California and beyond. He provided comprehensive planning support for several community plan updates in the City of San Diego, assisted with the Port of San Diego Master Plan Update (and Local Coastal Plan), and helped create the Regional Transit Oriented Development Strategy for the San Diego Association of Governments. He also worked on zoning code updates for the City of South Gate and the City of Imperial Beach and has experience with planning public transportation, bicycle, and pedestrian projects.

Matt is a skilled facilitator for public outreach, risk communication, and public-participation training. He specializes in online public outreach and has developed numerous websites and interactive online engagement tools. Matt is committed to thorough research in order to understand places, what makes them work, and the problems they face. He strives for the best possible communication through written, visual, and verbal methods to share findings and recommendations with decision makers and the public.

HIGHLIGHTS OF EXPERIENCE

- » Morena Boulevard Corridor Specific Plan and EIR | San Diego CA
- » Clairemont Mesa Community Plan Update | San Diego CA

PRIOR EXPERIENCE

- » South Gate Zoning Code Update | South Gate CA
- » Commercial / Mixed-Use Zones and Regulations Review | Imperial Beach CA
- » Best Practices for Implementation of SCAG's Sustainable Communities Strategy | Los Angeles CA
- » Hurricane Sandy Housing Recovery Strategy | New York NY
- » Kearny Mesa Community Plan Update | San Diego CA
- » Midway-Old Town Community Plan Update | San Diego CA
- » SANDAG Regional Transit Oriented Development Strategy | San Diego CA
- » High Speed Rail Station Area Master Plan | Fresno CA
- » TOD Feasibility Study | Rancho Cucamonga CA
- » Pacific Electric Right-of-Way / West Santa Ana Branch Corridor Alternative Analysis Planning Study | Los Angeles and Orange counties CA
- » SANDAG Regional Bike Map Update | San Diego CA
- » Main Street Promenade, Phase II | Lemon Grove CA
- » Comprehensive Active Transportation Strategy / Trails Master Plan | Carlsbad CA

PUBLICATIONS

- » "LiDAR Scanning for Historic Preservation: A Summary of the Historic Encinitas Boathouses Project," *Urban Design and Preservation Division Newsletter* [APA], Summer 2011

EDUCATION

- » Master of Urban and Regional Planning, University of California, Irvine
- » BA, Sociology, minor in Economics, Boston University

CERTIFICATIONS

- » American Institute of Certified Planners

AFFILIATIONS

- » American Planning Association
- » Founding Board Member, Encinitas Preservation Foundation

Team member since 2016

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BRIAN JUDD

Principal

Brian pilots an integrated team of practiced policy planners and innovative designers to create resourceful solutions for the company's often complex and always challenging projects. In addition to managing the Community Planning & Design Team, Brian continues to manage major long-range planning efforts. Most notably, Brian managed the successful development of The Ontario Plan, an innovative project that incorporated a new general plan into a broader system of governance, including a vision, governance manual, implementation program, and system of tracking and feedback. The project was also the first web-based general plan in the State of California, and it is included as a model in the California Planning Roundtable's "Reinventing the General Plan" project.

Brian's planning career has been split between public and private sectors—the County of Orange and PlaceWorks. He has developed strong capabilities in inter-governmental coordination and project management and provides a keen understanding of regulatory and political processes. Brian's knowledge of planning and his ability to effectively coordinate a multitude of public and private interests led to a variety of assignments on controversial, large-scale planning projects.

Working on such projects as the Anaheim, Highland, San Clemente and Ontario General Plan Updates, Brian has conceived and implemented creative planning solutions to physical, political, and regulatory challenges. Brian also leads PlaceWorks' team preparing the new Countywide Plan for San Bernardino County, a multifaceted project combining the general plan with a regional services plan, community plan continuum, regional issues forum, implementation program, and tracking and feedback system. The system will be a first-of-its-kind database driven website used to link long-term vision, goals and policies with shorter term implementation, priority setting and budgeting.

Brian is passionate about sharing his experiences and planning knowledge with students. He frequently lectures at UC Irvine's School of Policy, Planning & Design and recently served on the school's advisory board. He has also been a guest lecturer at Cal Poly Pomona and Art Center College of Design in Pasadena. Brian recently served on the Executive Committee for the Healthy Ontario Initiative, a nonprofit organization that seeks to improve Ontario's physical, social, and economic health and well-being.

HIGHLIGHTS OF EXPERIENCE

COMPREHENSIVE PLANNING

- » San Bernardino Countywide Web-Based General Plan and EIR | San Bernardino County CA
- » San Clemente General Plan Update & EIR | San Clemente CA
- » Ontario General Plan Update & EIR | Ontario CA
- » San Bernardino County Strategic Visioning Phases I & II | San Bernardino County CA
- » Anaheim General Plan, Zoning Code Update & EIR | Anaheim CA
- » El Monte General Plan, Zoning Code Update & EIR | El Monte CA
- » Highland General Plan Update, Zoning Code Update & EIR | Highland CA

EDUCATION

- » Master of Urban & Regional Planning, University of California, Irvine
- » BA, Social Ecology
University of California, Irvine

AFFILIATIONS

- » American Planning Association

Team member since 1999





BRIAN JUDD

Principal

bjudd@placeworks.com

- » Riverside County Integrated Project General Plan Update, including preparation of 6 Area Plans | Riverside County CA
- » Palm Springs General Plan Update, EIR & Downtown Urban Design Guide | Palm Springs CA
- » Rancho Mirage Comprehensive General Plan Update & EIR | Rancho Mirage CA
- » SCAG 2% Compass Blueprint Strategy Implementation | Southern California

HOUSING RESEARCH & ANALYSIS

- » Affordable Housing Design Competition for Eastern Coachella Valley | The California Endowment
- » Santa Ana Housing Element Update | Santa Ana CA
- » Highland Housing Element | Highland CA

COMMUNITY ENGAGEMENT

- » San Clemente General Plan Advisory Committee and Community Workshops, San Clemente Centennial General Plan | San Clemente CA
- » “Another Step Forward” Public Outreach Video on high-density housing and mixed use | Western Riverside County CA
- » Strategic Advisor Series and Community Workshops, Ontario General Plan Update | Ontario CA
- » Anaheim General Plan Rally and Community Workshop | Anaheim CA
- » Southern California Sustainable Daily Life Project | Newport Beach CA

URBAN PLANNING

- » Pacific Theater Drive-In Sites Land Use Analysis | Orange CA
- » Greenspot Feasibility Analysis | Orange County CA
- » Stadium Area Conceptual Planning | Anaheim CA
- » Community Design Element | Anaheim CA
- » Artesia Corridor Specific Plan | Gardena CA
- » Parc Anaheim Mixed Use | Anaheim CA
- » South Gate Education Center Specific Plan – Transportation Land Use Collaborative | South Gate CA
- » Stanton Plaza Specific Plan Update | Stanton CA

MUNICIPAL SERVICES

- » City of Highland Annexation Assistance | Highland CA

PRIOR EXPERIENCE

- » MCAS El Toro Master Development Program and Base Reuse Plan | Orange County CA
- » County of Orange General Plan Update (Project Manager at County) | Orange County CA



MARK TEAGUE, AICP

Associate Principal

In over 30 years of public- and private-sector experience, Mark has worked throughout California in agencies large and small and is considered an innovative problem solver. His projects include planned communities, shopping center EIRs, general plan and zoning code updates, impact fees, and public outreach for projects highly scrutinized by the public. Mark is often able to offer a unique approach to meeting a critical goal of a project. His experience as a planning director, and ability to see the whole of the project, ensures that every environmental document meets the need of the client. He has served as on-call extension of staff for numerous cities throughout California including Wildomar and Eastvale.

Mark is also an excellent public speaker and regularly presents at the League of California Cities Planning Commissioner's Academy on topics such as design guidelines, CEQA compliance, and how to read an EIR. He also teaches CEQA to staff with a focus on how new legal decisions affect compliance. Because of his public outreach skills, Mark has helped with projects ranging from Walmart to water-bottling plants and conducted town hall meetings about development services department efficiencies and increases in utility fees.

PRIOR EXPERIENCE

- » On-Call Staff Services | Wildomar CA
- » On-Call Environmental Staff Services | Eastvale CA
- » Boulevard Fire Station IS/MND | San Diego CA
- » Bandini Industrial Project EIR | Bell CA
- » Walmart EIR | Santee CA
- » Bell Commerce Center EIR | Bell CA
- » Community Plan Continuum | San Bernardino County CA
- » Design Guidelines | Mount Shasta CA
- » Development Code Update and Addendum | Rancho Cucamonga CA
- » Enlo Medical Center Expansion EIR | Chico CA
- » General Plan Update and EIR | Calimesa CA
- » General Plan Update and EIR | Eastvale CA
- » Goodman Commerce Center EIR | Eastvale CA
- » Housing Element Addendum | Chino CA
- » Housing Element Addendum | Twentynine Palms CA
- » Housing Element EIR | Riverside County CA
- » La Cienega Elementary School EIR | Los Angeles Unified School District
- » Lakeland Village IS/MND | Riverside County CA
- » Oak Creek Canyon EIR | Wildomar CA
- » Rancho Palma EIR | San Bernardino CA
- » San Gabriel Valley Climate Change Outreach | Southern California Edison
- » Zoning Code Update | Mount Shasta CA
- » General Plan Update | Mount Shasta CA
- » Mountaingate at Shasta Lake EIR | Shasta Lake CA
- » Nestle Water Bottling Plant EIR | McCloud CA
- » Vineyards at Anderson Specific Plan EIR | Anderson CA
- » Walmart EIR | Ceres CA

EDUCATION

- » BA, Political Science, California State University, Stanislaus

CERTIFICATIONS

- » American Institute of Certified Planners #019631

AFFILIATIONS

- » American Planning Association

Team member since 2016

SPEAKING ENGAGEMENTS

- » “Planning Fun-Da-Mentals” | 2016 League of California Cities Planning Commissioners Academy | San Ramon, CA
- » “Design Adds Value” | 2016 League of California Cities Planning Commissioners Academy | San Ramon, CA
- » CEQA Training | July/August 2016 | Imperial County, CA
- » “How to Read an EIR” | 2015 League of California Cities Planning Commissioners Academy | Newport Beach, CA
- » “Design Guidelines vs. Standards” | 2015 League of California Cities Planning Commissioners Academy | Newport Beach CA



MARK TEAGUE

Associate Principal

mteague@placeworks.com



JOANNA JANSEN, AICP, LEED AP

Associate Principal

Joanna oversees PlaceWorks' comprehensive planning practice in Northern California. She is committed to intensive hands-on involvement in all aspects of the projects she directs, from policy creation to meeting agendas to environmental review. Joanna has a particular expertise in skillfully managing integrated comprehensive plans and EIRs to ensure a streamlined flow of work and avoid surprises during the CEQA process.

Joanna has significant experience in the organization and facilitation of public involvement programs, both as stand-alone outreach efforts and as part of larger planning projects. She believes that meaningful community engagement from the earliest stages of a project enhances the ultimate outcome and establishes invaluable public support for its implementation. Joanna regularly facilitates public involvement at all scales, from community workshops with hundreds of participants to citizen committees and focus groups. She is skilled at designing and running meetings that result in focused, relevant input and at translating this input into policies.

HIGHLIGHTS OF EXPERIENCE

COMPREHENSIVE PLANNING

- » San Leandro General Plan Update, Housing Element, and EIR, San Leandro CA
- » Avenal General Plan and Sustainability Implementation Programs, Avenal CA
- » Morgan Hill 2035, Morgan Hill CA
- » Vacaville General Plan Update, Climate Action Plan, and EIR, Vacaville CA
- » Palo Alto Comprehensive Plan Amendment and EIR, Palo Alto CA
- » Los Gatos General Plan Update and EIR, Los Gatos CA
- » Los Gatos Housing Element, Los Gatos CA
- » Corcoran General Plan Update, Corcoran CA
- » Tulare TOD Plan and General Plan Amendment, Tulare CA
- » Butte County General Plan Update and EIR, Butte County CA
- » Oroville General Plan and Development Code Update and EIR, Oroville CA
- » Yolo County General Plan Update, Yolo County CA
- » Newman General Plan Update and EIR, Newman CA
- » Napa County Housing Element Update, Napa CA
- » Seaside Housing Element Update, Seaside CA
- » DuPont Bridgehead Road Specific Plan, Oakley CA
- » Livermore General Plan, Livermore CA
- » Napa County Housing Element Update and EIR, Napa County CA
- » Calistoga General Plan and EIR, Calistoga CA

PUBLIC PARTICIPATION

- » Vehicle Registration Fee Expenditure Plan and Public Outreach, Alameda County CA
- » Vehicle Registration Fee Public Outreach, Contra Costa County CA
- » Northeast Livermore Public Facilities and Programs Planning, Livermore CA
- » City/County Association of Governments of San Mateo County PLACE3S Modeling, San Mateo County CA
- » Bay Area Regional Smart Growth Strategy, San Francisco Bay Area CA

EDUCATION

- » BA, History, University of Arkansas, Fayetteville, AR

CERTIFICATIONS

- » American Institute of Certified Planners
- » Leadership in Energy and Environmental Design Accredited Professional

AFFILIATIONS

- » American Planning Association

Team member since 1999

- » Measure J Outreach, Facilitation, and Strategic Planning, Contra Costa CA
- » La Honda Creek Open Space Preserve Master Plan, La Honda CA
- » Livermore Vision Project, Livermore CA

ENVIRONMENTAL REVIEW

- » Downtown Vallejo Specific Plan and Virginia Street Mixed-Use Project EIR, Vallejo CA
- » Crocker Art Museum Expansion EIR, Sacramento CA
- » Siena Hill EIR, Oakland CA
- » Mission Square EIR, Sonoma CA
- » Butte Regional Conservation Plan EIR/EIS, Butte County CA
- » Soil Disposal Site Supplemental Environmental Assessment, Napa County CA
- » Northgate Christian Fellowship Church Initial Study and Negative Declaration, Benicia CA
- » Codornices Creek Initial Study, Albany CA
- » Bridge Rail Environmental Assessment, Napa CA
- » Marbella Subdivision Focused EIR, South San Francisco CA
- » Seismic Replacement Building #1 EIR, University of California Berkeley
- » Williams Property Siting Study, Fairfax CA
- » Corte Madera Housing Element EIR, Corte Madera CA
- » Ames Research Center EIS, Mountain View CA
- » Napa River Flood Protection Project Railroad Relocation and Detour Environmental Assessment/Initial Study, Napa County CA
- » Oyster Point Boulevard Initial Study, South San Francisco CA

SPEAKING ENGAGEMENTS

- » “Plan Implementation Tools,” UC Davis Extension, Land Use and Environmental Planning Certificate Program, 2010
- » “Sustainability in the Mountains Salon,” 2009 APA California Conference, Squaw Valley CA
- » “Using Steering Committees Effectively,” 2008 APA California Conference, Burbank CA

AWARDS

- » 2011 Outstanding Comprehensive Planning for a Small Jurisdiction, APACA Sacramento Valley Section, Butte County General Plan Update and EIR
- » 2003 Comprehensive Planning Award for a Small Jurisdiction, APACA Northern California Section, Livermore Vision Project and General Plan
- » 2003 NASA Group Achievement Award, Ames Research Center EIS
- » 2002 Congress for the New Urbanism Charter Award, Bay Area Regional Smart Growth Strategy

JOANNA JANSEN

Associate Principal

jjansen@placeworks.com



SARAH SUTTON, ASLA, LEED AP, BFQP

Principal, Landscape Architect

Sarah advises teams on landscape architecture, sustainability, and innovative stormwater management practices. She is an expert in sustainable design and construction practices with over 30 years of experience in public and private sector design, including parks, trails, streetscapes, and creek and habitat enhancements.

Sarah has a strong background in stormwater management and riparian corridor protection and restoration and has been responsible for the development of many parks that include stream realignment and revegetation within these sensitive habitats. As a leader in the firm's continuing commitment to environmental stewardship in planning, design, and project implementation, Sarah receives frequent invitations to present at conferences and to various organizations on these topics. At the 2010 American Society of Civil Engineer's International LID (Low Impact Development) Conference, she presented "Creating Better Communities with LID," which illustrated how to successfully implement LID to complement community character in new urbanist communities.

Sarah recently authored *The New American Front Yard: The Complete Guide for Creating a Beautiful, Eco-friendly, Water-wise, Low Maintenance Front Yard* (2013), co-authored the stream restoration section of the stormwater management chapter in *Landscape Architectural Graphic Standards* (2007), and teaches "Site Planning for Creeks, Riparian Corridors & Wetlands" and "Practical Approaches to Erosion Control and Land Restoration," both at the University of California, Davis, Extension.

HIGHLIGHTS OF EXPERIENCE

PARKS AND CIVIC LANDSCAPES

- » Quarry Park Phase 1 Improvements and Interpretive Signage, Saratoga CA
- » Iris Chang Park Master Plan, San Jose CA
- » Watershed Interpretive Signage for Lake Merritt, Oakland CA
- » Snow Park and Lakeside Green Streets, Oakland CA
- » Dona Spring Animal Shelter and Bicycle/Pedestrian Bridge Plaza, Berkeley CA
- » Pierce Street Neighborhood Park and Trail, Albany, CA
- » Duck Pond Park and Frog Pad Park, Hercules CA
- » Concept Design for Intersection Landscapes at Hacienda, Pleasanton CA
- » Potrero Hill Recreation Center/Playground, San Francisco CA

STREETSCAPES

- » Lakeside Green Streets, Oakland CA
- » Decoto Green Streets, Union City CA
- » Foothill Boulevard Streetscape Design Project, Oakland CA
- » John Muir Parkway, Hercules CA
- » 66th Avenue Streetscape Improvements, Oakland CA
- » Foothill/High/Melrose Streetscape Design, Oakland CA

TRAILS PLANNING AND DESIGN

- » Cross Alameda Trail at Jean Sweeney Open Space Park, Alameda CA
- » Devil's Slide Coastal Trail, San Mateo County CA
- » Wavecrest Coastal Trail project, Half Moon Bay CA
- » Pleasant Hill Road Multi-Purpose Trail, Lafayette CA

EDUCATION

- » BA, Landscape Architecture, University of California, Berkeley

REGISTRATIONS

- » California Licensed Landscape Architect No. 4219

CERTIFICATIONS

- » Leadership in Energy and Environmental Design Accredited Professional
- » Green Roof Professional
- » Bay-Friendly Qualified Landscape Professional
- » Certified Green Building Professional
- » Certificate in Therapeutic Garden Design

AFFILIATIONS

- » American Society of Landscape Architects
- » Build it Green
- » California Park and Recreation Society
- » Bay-Friendly Landscape Coalition, Board Chair
- » Green Roofs for Healthy Cities
- » Instructor, UC Berkeley Extension, Planting Design

Team member since 2003



- » Mori Point Trail Planning and Design, Pacifica CA

OPEN SPACE, CREEK AND HABITAT RESTORATION

- » Jean Sweeney Open Space Park, Alameda CA
- » Lake Merritt Bird Island Enhancements, Oakland CA
- » Comanche Creek Vegetation Management Plan, Chico CA
- » Sycamore Creek Annual Status Report, Danville CA

SUSTAINABLE PLANNING AND DESIGN

- » Stormwater Handbook Planting Guidelines, Alameda County CA
- » Bay-Friendly Landscape Design Resources On-Call Services, Alameda County CA
- » California Urban Water Conservation Council (CUWCC) Smart Urban Landscapes Residential Landscape Design Templates and Guidelines, California (statewide)
- » Technical Services and Training for Build it Green, California (statewide)
- » Rooftop Resources Assessment, Oakland CA

PUBLICATIONS

- » Author, The New American Front Yard: The Complete Guide for Creating a Beautiful, Eco-friendly, Water-wise, Low Maintenance Front Yard. (Aurora, Co: Tendril Press, 2013)
- » "Designing Projects to Protect Water Quality," Northern News, American Planning Association California Chapter Northern Section newsletter, February 2008
- » "Stream Restoration and Channel Daylighting" (co-author), In Landscape Architecture Graphic Standards, 1st ed., Leonard J. Hopper (ed.), John Wiley & Sons, 2006

SPEAKING ENGAGEMENTS

- » 2013 Municipal Green Building Conference and Expo, "Blue Reformation: Overcoming California's Water Addiction," Downey, CA
- » "Desperately Seeking WUCOLS: What's Next for the State's Model Landscape Ordinance and Landscape Water Use Classifications," 2011 California Irrigation Institute Annual Conference, Sacramento CA
- » "Green Roofs: From Concept to Reality," 2011 Annual Pretreatment, Pollution Prevention, and Stormwater (P3S) Conference of the California Water Environment Association (CWEA), Santa Clara CA
- » "Residential Landscape Design and the Model Water Efficient Landscape Ordinance," Landscape Water Conservation Workshop sponsored by The Water Forum, UC Davis Extension, and the California Urban Water Conservation Council, 2011, Roseville, Stockton, and Davis CA
- » "Creating Better Communities with Low Impact Development," 2010 American Society of Civil Engineers International LID Conference, San Francisco CA

AWARDS

- » 2015 Implementation Award: Large Jurisdiction, Award of Merit, California Chapter, American Planning Association, Devil's Slide Coastal Trail, Pacifica CA
- » 2014 Project of the Year for Environment/Parks: Under \$2 Million, American Public Works Association, Silicon Valley Chapter, Devil's Slide Coastal Trail, Pacifica CA
- » 2014 Silver Nautilus Award in Green Living/Sustainability, The New American Front Yard
- » 2011 Merit Award, American Society of Landscape Architects Northern California Chapter, Cryer Site Park Design, Oakland CA
- » 2005 Merit Award, American Society of Landscape Architects Northern California Chapter, Water-Efficient Demonstration Garden, San Jose CA

PROFESSIONAL ACTIVITIES

- » President, ASLA Northern California Chapter, 2004 to 2005

LEADERSHIP AND COMMUNITY

- » Board Chair, Bay-Friendly Landscape Coalition, 2014
- » Environmental Affairs Committee, San Ramon CA, 1996 to 1998

SARAH SUTTON

Principal

ssutton@placeworks.com



ISBY SWICK FLEISCHMANN, LEED AP

Senior Associate

Isby specializes in landscape design, resource planning, and community outreach. She has significant experience in managing master plans for parks and open spaces, including the Saratoga Quarry Park Master Plan and Initial Study Mitigated Negative Declaration for the City of Saratoga, the Concord Hills Regional Park Land Use Plan and EIR for the East Bay Regional Park District, the Mount Tamalpais East Peak Facilities Management Plan for California State Parks, the San Vicente Redwoods Public Access Plan for the Land Trust of Santa Cruz County, and the Sanborn County Park Conceptual Use Plan for Santa Clara County Parks and Recreation Department. Complementing her focus on large parks and open spaces, Isby brings expertise and experience in trail planning, interpretive programming, urban forestry, and urban greening projects with relevant projects that include the Salinas Urban Greening Plan for the City of Salinas, the San Carlos Hillside Trails Plan for the City of San Carlos, and the El Monte Community Urban Forest Management Plan for Amigos de los Rios. She has a strong background in public outreach, having worked as an outreach coordinator and as an environmental educator throughout California with a range of non-profit and public entities.

HIGHLIGHTS OF EXPERIENCE

PARKS, TRAILS, AND OPEN SPACE

- » Concord Hills Regional Park Land Use Plan and EIR, Concord CA
- » Mount Tamalpais East Peak Facilities Management Plan, Marin County CA
- » Wavecrest Coastal Trail Plan, San Mateo CA
- » Wavecrest Concept Plan, Half Moon Bay CA
- » Supervisorial District 5 Trails Assessment and GIS Mapping, LA County CA
- » Master Plan for Sustainable Parks and Recreation, LA County CA
- » Saratoga Quarry Park Master Plan, Saratoga CA
- » Parks, Trails, and Open Space Assessment, Los Gatos CA
- » San Carlos Trails Project, San Carlos CA
- » Martial Cottle Park Master Plan, San Jose CA
- » Trancas Crossing Park and Napa River Trail, Napa CA
- » Lost Lake Park Master Plan, Fresno County CA

URBAN AGRICULTURE AND URBAN FORESTRY

- » Salinas Urban Greening Plan, Salinas CA
- » Oroville Urban Area Master Greening Plan, Oroville CA
- » Urban Farm and Garden Master Plan, Alameda CA
- » El Monte Urban and Community Forestry Management Plan, El Monte CA
- » Agricultural Park Consulting Services, Davis CA
- » Martial Cottle Park Master Plan, San Jose CA

RESOURCE PLANNING

- » San Vicente Redwoods Public Access Plan, Santa Cruz County CA
- » Comanche Creek Vegetation Management Plan, Chico CA
- » Creek Permit for Embarcadero Bridge over Lake Merritt Channel, Oakland CA
- » Midpeninsula Regional Open Space District Resource Management Plan Assistance, San Mateo County CA

EDUCATION

- » MLA, California Polytechnic State University, Pomona
- » BS, Natural Resource Planning and Interpretation, minor in Studio Art, California State University, Humboldt

CERTIFICATIONS

- » Leadership in Energy and Environmental Design Accredited Professional

AFFILIATIONS

- » American Society of Landscape Architects

Team member since 2007





ISBY FLEISCHMANN
Senior Associate
ifleischmann@placeworks.com

URBAN DESIGN AND STREETScape IMPROVEMENTS

- » Walnut Creek Sanctuary Transportation Demand Management Plan, Walnut Creek CA
- » Pedestrian, Bicycle and Transit Safe Access Plan, Walnut Creek CA
- » Davis Tools of Engagement and Concept Plans, Davis CA

ENVIRONMENTAL PLANNING

- » Lost Lake Park Master Plan Initial Study and MND, Fresno County CA
- » Municipal Services Review, Lodi CA
- » Winters Municipal Services Review, Winters CA
- » Martial Cottle Park Master Plan, San Jose CA

PUBLICATIONS

- » “Transforming Urban Environments for a Post-Peak Oil Future” (in collaboration with members of Cal Poly Studio 606), City of Ventura, 2008

SPEAKING ENGAGEMENTS

- » “Transforming Urban Environments for a Post-Peak Oil Future: Research and Design Element”, 2007 Agriculture at the Metropolitan Edge Symposium, Berkeley CA
- » “Transforming Urban Environments for a Post-Peak Oil Future: Research and Design Element”, 2007 Southern California Association of Governments Presentation, Los Angeles CA
- » “Transforming Urban Environments for a Post-Peak Oil Future: Research and Design Element”, RESILIENCE 2008: Resilience, Adaptation and Transformation in Turbulent Times International Science and Policy Conference, Stockholm, Sweden

AWARDS

- » 2011 Innovation in Green Community Planning Award, APACA Northern Section, Martial Cottle Park Master Plan and EIR
- » 2007 Honor Award, American Society of Landscape Architecture



RANDAL W. JACKSON, ASLA

President

Throughout his more than 45 years of experience in planning and design, Randy Jackson has conceived and developed unique land use and design concepts for award-winning communities. He continues to focus his expertise on healthy communities built around and integrating transportation, transit, open space, and park and recreation systems. He oversees projects throughout California, across the United States, and abroad.

Randy has a wide range of community design and landscape architecture experience with both public and private concerns throughout the western and southwestern United States and the Pacific Basin. He is a guest lecturer the University of California's Irvine and Riverside campuses for courses in the Planning Certificate program. He also taught land development in the Graduate School of Social Ecology at the UC Irvine for 15 years.

Randy recently completed a two-year term as Chairman of Urban Land Institute's Community Development Council (Blue Flight), a national product council leading the discussion in the areas of suburban new communities, suburban large-scale (multi-use) communities, rehabilitation/reuse, asset management, and process. He currently serves as ULI Governor as well as Chairman of ULI Orange County/Inland Empire's District Council.

HIGHLIGHTS OF EXPERIENCE

INFILL & REDEVELOPMENT

- » CollegeTown Vision Plan | Fullerton CA
- » MCAS Tustin Reuse Plan/Specific Plan | Tustin CA
- » Prospect Village, Downtown Tustin Redevelopment | Tustin CA
- » Stanton Plaza Specific Plan | Stanton CA
- » Anaheim Downtown Industrial Area Reuse Plan | Anaheim CA
- » I-5 Freeway Expansion Analysis, I-5 Corridor Phase One, Freeway Overlay Zone | Santa Fe Springs CA
- » MCAS El Toro Conversion Specific Plan | El Toro CA
- » Rialto Airport Land Use Study | Rialto CA

TRANSIT-ORIENTED DEVELOPMENT

- » Transit-oriented development: visioning, planning and design, and strategic implementation projects for the cities of Azusa, Corona, Covina, Fullerton, Hemet, Riverside, Temecula, and March AFB as part of SCAG's Compass Blueprint Demonstration Program
- » North Orange County Cities Go Local Program | Orange County CA
- » San Diego Association of Governments (SANDAG) Growth Management Study | Five Cities, San Diego County CA

URBAN PLANNING

- » Irvine Business Complex Program EIR | Irvine CA
- » San Clemente Master Streetscape Plan | San Clemente CA
- » Mammoth Crossings Planning Study & Specific Plan | Mammoth Lakes CA

EDUCATION

- » Bachelor of Landscape Architecture, Utah State University
- » Graduate Studies, University of Hawaii, Pacific Urban Studies Center

REGISTRATIONS

- » Licensed Landscape Architect in California, No. 1582
- » Nevada, No. 307

AFFILIATIONS

- » American Society of Landscape Architects
- » Urban Land Institute, Governor; Chairman of Orange County/Inland Empire District Council

Team member since 1977

- » Central Park Master Plan Design Guidelines | Irvine CA
- » Moffett Meadows / Marble Mountains Design & Processing | Irvine & Tustin CA

GENERAL PLANS

- » Menifee General Plan Update & EIR | Menifee CA
- » Palm Springs General Plan, EIR, and Urban Design Guide | Palm Springs CA
- » Temecula Inaugural General Plan Update & EIR | Temecula CA

STRATEGIC PLANS

- » Kennecott Master Plan | Oquirrh Mountain UT
- » Centennial Master Plan, Tejon Ranch | Los Angeles County CA
- » Newhall Ranch Communities Planning | Newhall Ranch CA
- » Collier Strategic Plan | Collier County FL
- » Estrella Mountain Ranch Strategic Plan | Goodyear AZ
- » Jianfengling Resort Master Plan | Hainan Island, People's Republic of China
- » The Creative City Master Plan | Phu Yen, Vietnam

LARGE-SCALE PLANNED COMMUNITIES

- » Wood Ranch Specific Plan | Simi Valley CA
- » Bighorn Master Plan | Palm Desert CA
- » Hawadi Master Plan | Saudi Arabia
- » The Summit Master Plan | Richland SC
- » Beacon Hill Master Plan & Design Guidelines | Laguna Niguel CA
- » Biosphere Master Plan | Pima County AZ
- » Kohl Ranch Master Plan | Riverside County CA
- » Fisher Basin Comprehensive Master Plan | Vancouver WA
- » Kiley Ranch North Master Plan | Sparks NV
- » The Arboretum Specific Plan | Fontana CA

PUBLICATIONS

- » Natural Eco Systems; Trails & Access Way System | Department of Land & Natural Resources, State of Hawaii
- » Kuhala, Hawaii Community Master Plan
- » Casebook on Land Use Design | San Bernardino County/Cities
- » Transportation, Land Use and Air Quality Design Manual | San Bernardino County/Cities

SPEAKING ENGAGEMENTS

- » "25 Big Ideas for the +55 Market" | 2013 BIA +55 Housing Market
- » "Multi-Generational Housing Market" | 2012 PCBC Gold Nugget Presentation
- » "Creating a Healthy Downtown Bakersfield" | Keynote speaker 2014 60th year DBA
- » "How to Sell Homes in a Down Market and Reinvent the Future with Vision and Creativity" | 2008 PCBC (Pacific Coast Builders Conference) | San Francisco CA
- » "Design, Planning, and Overcoming Scaleism" | 2008 APACA Conference | Hollywood CA
- » "Conservation Zones and Master Planned Communities" | 2008 ULI Annual Fall Meeting | Miami FL
- » "Healthy Communities" | 2007 PCBC | San Francisco CA
- » "New Downtowns in Rural Areas" | 2007 BIS (Building Industry Show) | Long Beach CA
- » "Entitling Infill Development" | 2006 APACA Conference | Orange County CA
- » "Vertical Building: Suburban Villages in Orange County" | 2005 BIA-OC (Building Industry of America, Orange County Chapter) | Orange County CA
- » "New Homeownership Affordable Analysis Model" | 2004 BIA-OC | Orange County CA
- » "Diverse Housing Options: Infill and Mixed Use Strategies" | 2003 BIA-OC | Orange County CA
- » "Converting Strip Malls" | 2002 APACA Conference | San Diego CA

RANDAL W. JACKSON

President

rjackson@placeworks.com

Chris Taylor

AIA, LEED AP, DBIA



Principal in Charge
HMC Architects

Education /

M. Arch., Cal Poly Pomona

Professional Registration /

Licensed Architect, California (C19759)

Affiliations /

American Institute of Architects (AIA)

LEED Accredited Professional Building Design + Construction (LEED AP BD+C)

Designated Design-Build Professional, Design-Build Institute of America (DBIA)

Chris has more than 30 years of experience and passionately devotes his attention to coordinating the best delivery practices that continually raise the quality of HMC's drawings, design and client service. Chris has developed a reputation for successfully leading collaborative, consensus-building processes that result in facilities that meet the current and future needs of his clients.

Relevant Experience

Los Angeles County Community Development Commission

Liberty Community Plaza (LEED Gold)

Town of Mammoth Lakes

New Community Multi-use Facility (ZNE)

New Police Department Headquarters

Town of Apple Valley

Police Department and Code Enforcement Building

Apple Valley Town Hall

Rancho Cucamonga Fire Protection District

Training Center Phase 2

College of the Desert

Public Safety Academy and Roy Wilson Fire Training Center

County of San Bernardino

Sheriffs Training Center

District Criminal, Family Law, Traffic and Probate Court

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Eric Carbonnier, PhD

AIA, LEED AP BD+C



Vice President of Sustainability
HMC Architects

Education /

PhD, Architecture, University of Oregon
MS, Regenerative Studies, Cal Poly Pomona
B. Arch., Woodbury University

Professional Registration /

Licensed Architect, California (C27730)
NCARB Certificate (53105)

Affiliations /

American Institute of Architects (AIA)
LEED Accredited Professional Building Design + Construction (LEED AP BD+C)

Eric, with 28 years of experience, is an architect and Vice President of Sustainability at HMC Architects focused on energy conservation strategies leading to zero-net energy architecture. Eric was instrumental on the Cucamonga Valley Water District's LEED Platinum Frontier Project in developing the vision and integration of sustainable strategies, including ground water recharge strategies, water conservation, thermal and electrical on-site renewable energy generation, downdraft cool towers, and local material reuse. Eric has secured over \$2 million in grants and certified the second largest USGBC Campus in California, ranked 7th nationally and 9th globally. He was a Graduate Teaching Fellow and Researcher at the University of Oregon's Energy Studies in Buildings Laboratory (ESBL), advancing high-performance windows using nanofluid technology. Eric's sustainable design initiatives resonate throughout his career, and he has collaborated on numerous high-performance designs and award-winning projects.

Relevant Project Experience

Cucamonga Valley Water District

The Frontier Project – Sustainability Demonstration Facility

County of San Diego

Health and Human Services Agency Zero Net Energy Facility

City of Irvine

Quail Hill Community Nature Center

Los Angeles County of Education

Liberty Community Plaza

Chabot-Las Positas CCD

Academic Classroom Building 100

Coast CCD

Golden West College, Student Success and Library Renovation
Golden West College, International Student Program Renovation
Orange Coast College, Chemistry Renovation and Addition

Mt. San Antonio CCD

ESL Building
Health Careers Center

North Orange County CCD

Fullerton College, Physical Education Building

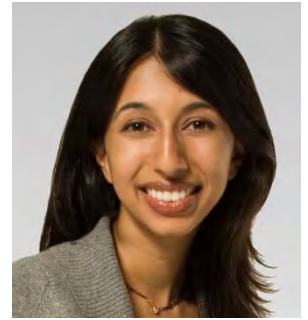
San Diego State University

Zura Hall Student Housing Refresh

Eera Babtiwale

LEED AP BD+C

Sustainability Director
HMC Architects



Education /

Master of Architecture,
University of California, Los Angeles

Bachelor of Arts, Architecture,
University of California, Berkeley

Professional Registration /

LEED Accredited Professional (LEED AP BD+C)

Affiliations /

Member, Society for College & University Planning (SCUP)

Assoc. Member, American Institute of Architects (AIA)

Eera's strong design skills and passionate environmental awareness result in projects that are functional, creative, and sustainable. As an environmental specialist with 16 years of experience, she is dedicated to the research, development, and implementation of advanced high-performance architecture. Eera will integrate high-performance environmental concepts into your project using the most advanced tools and techniques. She regularly facilitates eco-charettes—interactive workshops that introduce sustainable design concepts to stakeholders in the early stages of a project. Eera will work closely with the design team to seamlessly integrate sustainable concepts into design features, provide environmental analyses, offer responsible material choices, and thoroughly explain the short- and long-term costs and benefits of each sustainable option.

Relevant Sustainability Master Planning Experience

Cucamonga Valley Water District

The Frontier Project

Allan Hancock College

Facilities Sustainability Master Plan

Grossmont-Cuyamaca CCD

Facilities Sustainability Master Plan

MiraCosta College

Comprehensive Master Plan

Sustainability Design Guidelines

Riverside CCD

Moreno Valley College, Comprehensive Sustainability Master Plan

Chaffey CCD

Chaffey College, Facilities Sustainability Master Plan

Relevant Sustainable Building and Design Project Experience

CSU Monterey Bay

New Academic II Building, LEED Platinum

Los Angeles CCD

Pierce College, Library/Learning Crossroads Building, LEED Platinum

LA Southwest College, Middle College High School, LEED Gold

LA Harbor College, Student Union, LEED Gold Target

College of the Desert

Barker Nursing and Health Sciences Complex, LEED Gold

Child Development Center, LEED Gold

Mt. San Antonio College

Student Success Center, LEED Gold Target

Design Technology Center, LEED Silver

Athletics Complex East, LEED Gold Target

Riverside CCD

Riverside City College, Student Services and Administration Building, LEED Silver Target

Norco College, Center for Health, Wellness and Kinesiology (FPP)

Cerritos College

Field House, LEED Silver Target

Health and Wellness Complex, LEED Silver Target

Chaffey CCD

Chaffey College, Child Development Center Area of Refuge

San Bernardino CCD

San Bernardino Valley College, Gymnasium and Athletics Complex, LEED Gold target

Crafton Hills College, Crafton Center, LEED Gold

San José/Evergreen CCD

Evergreen Valley College, Math, Science and Social Sciences Building, LEED Platinum target

Evergreen Valley College, Fitness Center, LEED Platinum target

Cal Poly Pomona

Student Housing Replacement Phase I, LEED Gold Target

Collins School of Hospitality Management Expansion, LEED Gold Target

CSU San Marcos

Student Health and Counseling Services Building, LEED Gold

San Diego State University

Zura Hall Refresh, LEED Gold

UC Riverside

School of Medicine Education Building, LEED Silver

Jacob Bowman



Senior Cost Estimator
HMC Architects

Education /

Associate of Architecture, AAIA

BS, Computer Information Systems, Devry University

Jacob has 14 years of industry experience. With a background in architecture and engineering design, Jacob honed his CAD skills and design abilities which laid the foundation for his career in estimating. He has estimated projects ranging from medical office buildings to complete greenfield hospitals, with costs ranging from less than \$1M to more than \$2.5B. Jacob has estimated projects at all phases, from concept through construction documents; and provided value engineering and change order review on numerous projects. As an estimator, he has worked for general contractors, construction managers, and third party cost consultants, bringing a unique perspective and immense value to HMC's projects.

As Senior Cost Estimator, Jacob will develop cost models and estimates for each phase of your project. He will interact with the project team, including the consultants, to produce quality reports that contain pricing, take offs, change order review, and comprehensive analysis.

Relevant Experience

City of Irvine

Quail Hill Community Park and Community Center

Los Angeles Community Development Department

Liberty Community Plaza

San Bernardino CCD

San Bernardino Valley College, Gymnasium

San Bernardino Valley College, Parking Structure

Chaffey CCD

Omnitrans Transit Center

West Valley-Mission CCD

West Valley College, Arts and Social Science Renovation

Ventura County CCD

Oxnard College, Dental Hygiene School

Desert CCD

Child Development Center

Central Campus Redevelopment Project

Mt. San Antonio College

Student Success Center

Athletics Complex Precinct Planning

Rancho Santiago CCD

Santa Ana College, Dunlap Hall Remodel

Palomar College

Industrial Technology Building

San Jose/Evergreen CCD

South Campus Programming

Los Angeles CCD

Construction Technology Building

CSU Los Angeles

New Student Union

University Student Union Feasibility Study

UC San Diego

Torrey Pines Center North Renovation

Rowland USD

Nogales High School Revival

Centinela Valley USD

Leuzinger High School Prefast Buildings

Oxnard Union High School District

Rancho Campana High School

Newport Mesa USD

Costa Mesa High School, Junior High Enclave

Santa Ana USD

Santa Ana High School Modernization

Irvine USD

Portola High School

University High School, Science Lab Upgrades

Clovis USD

Alta Sierra Intermediate School Modernization

Solana Beach School District

Comprehensive Master Planning Services

Los Angeles USD

San Pedro High School, Small Learning Communities

Fairfield-Suisun USD

Fairview K-5 Elementary School

University of Nevada, Reno

Reynolds School of Journalism Renovation

Riverside County Office of Education

School of Career Education

Appendix C. Company Overview

PLACEWORKS

Official Registered Name:	PlaceWorks, Inc.
D&B Number:	08-914-5023
Primary and Secondary SIC Numbers:	899: Miscellaneous Services 8999: Services, Not Elsewhere Classified (Scientific and Related Consulting Services, All Other Information Providers, Environmental Consultants)
Address, telephone & fax numbers:	3 MacArthur Place, Suite 1100 Santa Ana, CA 92707 714.966.9220 714.966.9221 (fax)
Primary Key Contact:	Tammy L. Seale, Associate Principal 805.235.7876 tseale@placeworks.com
Person authorized to contractually bind the organization:	Karen Gulley, Principal and Vice President 714.966.9220 x2347 kgulley@placeworks.com
Brief History	PlaceWorks was founded in 1975 as The Center for Planning & Research. It was modeled after the principles of the Bauhaus School of Design in Germany, which aimed to bring design disciplines together and integrate individual work efforts into a greater whole. Within three years, the firm incorporated as The Planning Center and operated under this name for more than 30 years. The Planning Center's passion for more integrative planning and design drove the firm's expansion into new fields. Environmental analysis was added in 1980 and school facilities planning in 1985. In 2006, The Planning Center acquired Meredith & Associates, which added site assessment and remediation, environmental science and engineering, and human health risk assessment to the firm's capabilities. In 2011, The Planning Center acquired Design, Community & Environment (DC&E) and operated as The Planning Center DC&E for the next three years. DC&E, founded in 1995, was similarly noteworthy for providing comprehensive planning, design, and environmental services, but also added landscape architecture to the firm's portfolio of practice areas. To reflect the firm's wider range of services, the name was changed to PlaceWorks in 2014. Our interdisciplinary, holistic approach integrates sustainability, economic vitality, and community goals to create great places. The firm currently maintains seven offices throughout the state of California and employs approximately 130 employees.

HMC ARCHITECTS

Official Registered Name:	HMC Group
D&B Number:	06-449-0808
Primary and Secondary SIC Numbers:	871. Engineering, Architectural, and Surveying 8712. Architectural Services
Address, telephone & fax numbers:	3546 Concours Street Ontario, CA 91764 909.989.9979 909.483.1400 (fax)
Primary Key Contact:	Chris Taylor, Principal 909.989.9979 909.483.1400 (fax)
Person authorized to contractually bind the organization:	Chris Taylor, Principal 909.989.9979 909.483.1400 (fax)
Brief History	In 1940, Jay Dewey Harnish opened a small architectural office in Ontario, California, to anticipate the demand for healthcare and institutional work that would come with peacetime after World War II. Today, HMC is a 300-person company with nine offices and thousands of completed projects.

Appendix D. Project Experience

Provided on the following pages are detailed project descriptions for some of our most relevant project experience.



ADVANCED TECHNOLOGY & EDUCATION PARK

A Visionary Guide

Project Type	Development Master Plan and Visioning
Location	Tustin, California
Size	66 acres
Client	South Orange County Community College District via HMC Architects
Date Completed	June 2015
Services Provided	Design Charrettes, Site Plan Alternatives, Visioning Poster, Goals and Design Parameters, Specific Plan/Development Agreement Compliance



The Advanced Technology Education Park (ATEP) will be a 66-acre satellite campus developed by the South Orange County Community College District, designed to provide workforce development, advanced technology, and career technical education programs. Located on the former MCAS Tustin, this site was part of a 1,600-acre base reuse plan involving residential, commercial, office, and a variety of institutional land uses. ATEP is envisioned as an innovative education park that “Changes the Way People Learn” by integrating college programs with an on-campus, private-sector learning environment. There were no models for this type of project, especially at the community college level. PlaceWorks was part of a team that led a series of visioning and design charrettes with district and campus officials and private market experts to prepare a high-level framework plan that would guide development decisions over the next 20 years. The development master organized major development components—zones for public and private buildings, parking, circulation, and outdoor collaborative spaces. PlaceWorks developed core planning principles, based on a collective vision, that shaped and guided each of the four alternatives. The final framework plan included a detailed phasing plan for buildings, infrastructure, and parking that met district goals and still provided the flexibility needed to bring in private-sector or other partners over time.





ATEP 2015 Development Framework

Advanced Technology & Education Park | South Orange County Community College District

www.atepoc.com



VISION GOALS

- + Create a cutting-edge education park that supports advanced technology, workforce development, and career technical education.
- + Attract strategic local, regional, and global partnerships to provide student internship opportunities, synergistic collaborations, and workforce development.
- + Ensure that buildings and infrastructure maximize opportunities for sustainable design and operations.
- + Create a welcoming, interactive, high-energy place that inspires students, faculty, and business leaders.
- + Offer experiential learning outside the classrooms in outdoor settings designed to encourage collaboration and flexibility for a variety of programs and activities.
- + Create convenient pedestrian- and bicycle-friendly circulation paths, integrated with Tustin Legacy and the nearby Metrolink Station.



PARCELS AT EL TORO

Positioning the Gateway to the Great Park

Project Type	Conceptual Site Plans and Market Analysis
Location	Orange County, El Toro, Great Park, California
Size	3 sites; 201 acres total
Client	County of Orange, OC Public Works
Date Completed	November 2011
Services Provided	Conceptual Site Planning, Market Positioning, Presentation to Board of Supervisors



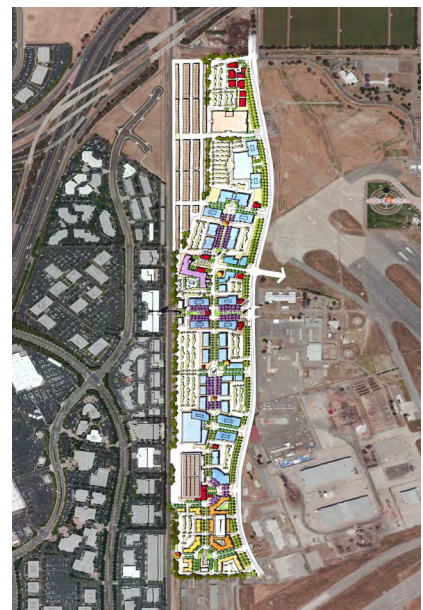
PlaceWorks was retained by the County of Orange to develop scenarios for future reuse of several county-owned properties adjacent to the Great Park and future Great Park Neighborhoods development (Five Point Communities) in the City of Irvine. The county requested that the consultant team explore the “art of the possible” for the future development of the sites to establish an approach that would result in the highest and best value for Orange County taxpayers. Ultimately, the county used the final product as a basis to establish goals and objectives that define how revenue generation related to the properties should be balanced with uses that can provide a public benefit.



PlaceWorks (in collaboration with Jones Lang LaSalle, Tait Associates, and Gensler) prepared a parcel utilization concept plan for 200 acres of county property at El Toro. The project consisted of three sites: a 100-acre site adjacent to Marine Way, and two properties adjacent to the future Alton Parkway alignment. The analysis included a review of previous site analysis, a market assessment, analysis of physical site constraints and opportunities, a site visit, and collaboration with county officials to identify a viable mix of uses for the future development of the parcels.

The analysis reviewed the county’s future real property assets and included an initial market assessment of the range of short- and long-term uses and potential viability for development of each. The results were used to prioritize potential uses for the three sites and to eliminate uses that would not be deemed feasible given market demand, competitive supply, site characteristics, and other factors.

PlaceWorks developed several concepts, including: GreenTech, Active Sports Center, and Lifestyle Center concepts, as well as a “highest and best use” option that included a mix of hotel, office, retail, and high-density housing on the 100-acre site. The Board of Supervisors used the concepts and market analysis to provide direction to staff regarding the subsequent steps that should be taken to maximize the value of the county’s assets, including initiating discussions with the City of Irvine, timing and placement of new infrastructure, and solicitation of a master developer agreement.





MCAS EL TORO BASE REUSE

Economic Prosperity Through One Common Vision

Project Type	Base Reuse
Location	Orange County, California
Size	5,000 acres
Client	County of Orange
Date Completed	2002
Services Provided	Open Space Plan, Business Park Design Guidelines, Agricultural Plan, Airport Terminal Landscape Plan, Financial Analysis, Due Diligence (later for Lennar/LNR Properties)



PlaceWorks was selected by the County of Orange to prepare the non-aviation component of the reuse plan for Marine Corps Air Station El Toro (MCAS), which was closed in July 1999. Working in conjunction with the aviation consultant preparing the master plan for the proposed 28.8 million annual passenger International Airport and associated facilities, PlaceWorks assisted the County in the land use, circulation, and landscaping for the remaining 2,400 acres of the property.

The iterative process resulted in a variety of land uses tied together by a common vision: that Orange County would enjoy economic prosperity well into the 21st century through the realization of a vibrant, modern airport community that attracts companies, generates jobs, maintains its competitiveness in a global economy, preserves the environment, and enhances the quality of life for all residents of the county. The reuse plan proposed a commercial airport with supporting aviation uses, a regional park, habitat reserve, business park, and cultural/institutional center. The airport's operational characteristics and surrounding land uses played a key role in the preparation of each component of the reuse plan which includes design guidelines for an 86-acre business park, a park development plan for Orange County's largest regional park, agricultural lands plan, and a project-wide landscaping plan that cohesively wove all the components together.

In recent years, PlaceWorks' past experience and involvement with MCAS El Toro has made it a valuable player in assisting and evaluating the property as it transitions and positions for development. In 2005, PlaceWorks assisted the Lennar/LNR Properties team in a six-month due diligence phase in preparation of the General Services Administration public auction of four parcels of approximately 800 acres of developable land at Heritage Fields in Irvine, formerly known as the El Toro Marine Corps Air Station.



MCAS EL TORO BASE REUSE

Economic Prosperity Through One Common Vision



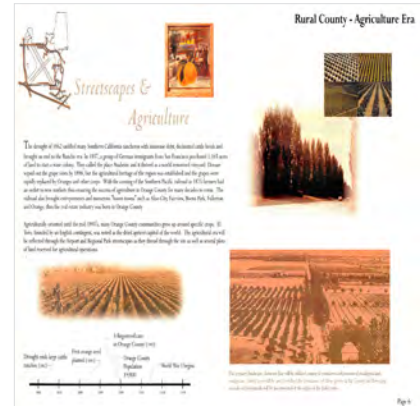
Open Space Plan: This highly graphical plan establishes the design theme and framework for Orange County's largest regional park. Proposed uses include active and passive recreational areas, two golf courses, a wildlife habitat area, trails, and meeting facilities.

Business Park Design Guidelines: A site plan and design guidelines were prepared for an 86-acre business park. Owing to the proximity to the airport and surrounding uses; the site planning, landscaping, architectural, and lighting guidelines were crafted to ensure a safe and high quality working environment.

Agricultural Plan: This plan provides policy guidance to ensure continued operations of agricultural lands during phasing and ultimate buildout of adjacent uses.

Airport Terminal Landscape Plan: A landscape plan was prepared for the airport terminal area complementary with the design them of the entire project area.

Financial Analysis: Construction costs, operation and maintenance costs, and revenue estimates were prepared for the non-aviation land uses.





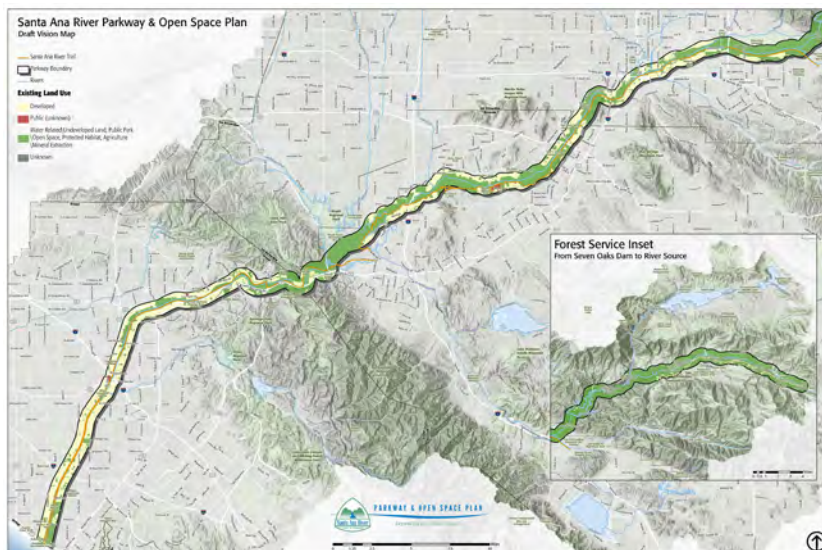
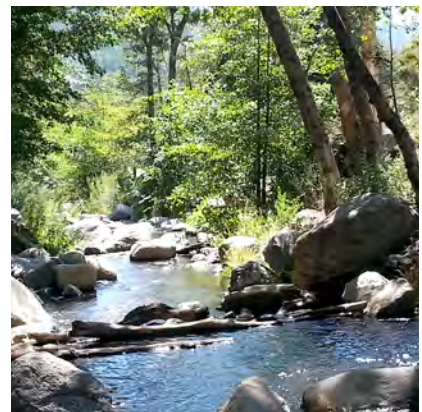
SANTA ANA RIVER PARKWAY PLAN

Connecting Parks and Open Space Across the Region

Project Type	Open Space and Resource Planning
Location	San Bernardino, Riverside, and Orange Counties
Size	100 Miles
Client	California State Coastal Conservancy
Date Completed	In Progress
Services Provided	Park and Open Space Planning, Landscape Architecture, GIS, Community Outreach, Online Engagement, Graphic Design, Signage Standards



PlaceWorks is working with California State Coastal Conservancy to identify a comprehensive vision for the Parkway that reaches beyond the spine of the Santa Ana River Trail, connecting nearby communities to the River Trail and integrating new parks and green space opportunities into the network. Key components of the planning process include the synthesis of numerous planning efforts along the corridor, assessment of the parkway boundaries and parkway needs, development of a comprehensive GIS database that identifies existing and potential opportunities in the corridor, and development of prioritization tools that can be applied to existing and future project opportunities. PlaceWorks will utilize online tools and in-person meetings and trainings to engage project partners and the public, ensuring a final Plan that is comprehensive and broadly supported. The final Plan will be a clear, graphically-rich document that will provide clear priorities and strategies to guide the enhancement and expansion of the Parkway, as well interagency coordination and collaboration. In addition to prioritization and funding strategies, the Plan will identify signage standards and other tools to build recognition of the Parkway as an exceptional regional asset. The geodatabase and signage recommendation developed as part of this effort will directly inform the development of Santa Ana River Trail maps and outreach materials.



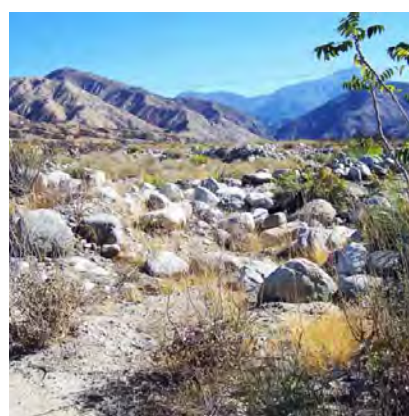
GREENSPOT DEVELOPMENT FEASIBILITY ANALYSIS

Conceptual Site Planning

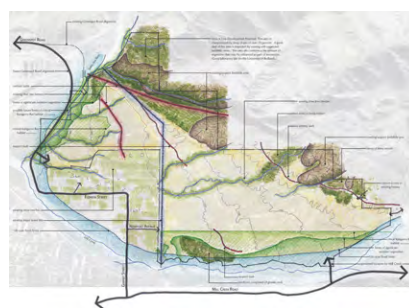
Project Type	Development Feasibility Analysis
Location	Highland, California
Size	1,650 acres
Client	Orange County
Date Completed	2008
Services Provided	Detailed Due Diligence, Opportunities and Constraints Analysis, Conceptual Site Planning



The Seven Oaks Dam was part of the Santa Ana River Mainstem Project under the US Army Corps of Engineers, with the cost shared between Orange, Riverside, and San Bernardino counties under a “local cooperation agreement.” The counties bought the Greenspot site in San Bernardino County and removed six million cubic yards to build the earthen dam. Because Orange County benefitted most from the dam, it had the lead responsibility for selling the property after the dam was finished in 1999. With the support of the Orange County Flood Control District, the property was annexed to Highland in 2000 and later rezoned from rural residential to planned development. A due diligence report found that the property had adequate development potential and recommended further analysis of opportunities and constraints, so in 2007, Orange County released a request for qualifications for a conceptual site plan and related studies.



As the lead consultant, PlaceWorks correlated the information in the technical studies—biology, geotechnical, environmental, market, and water and sewer—to create an overall picture of the constraints and opportunities for development and finalized the recommendations with input from the county, the city of Highland, and the technical subconsultants. The technical analyses found that about two-thirds of the site were considered developable—some of the constraints were steep terrain, landslide areas, and known and suspected earthquake faults as well as critical habitat for the kangaroo rat and blue-line streams.



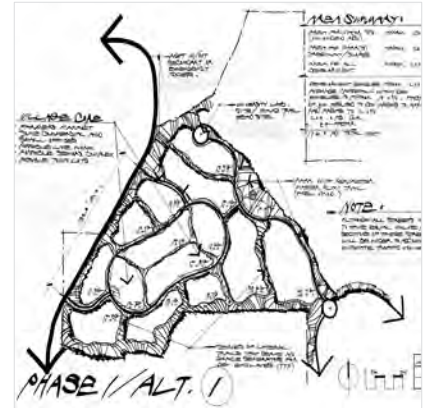
Based on these environmental constraints and the “goals and principles” articulated by stakeholders and refined by PlaceWorks, PlaceWorks created two conceptual site plans. The market study had found that this part of San Bernardino County could absorb about 4,000 housing units over seven years, so PlaceWorks divided the site into four primary development areas or “villages,” with a mix of residential product types at various densities and supporting commercial in each village area. The conceptual plans were the basis for the traffic studies, which, in turn, were used to provide “cost to complete” engineering estimates.



HARMONY MASTER PLAN

A Community Concert

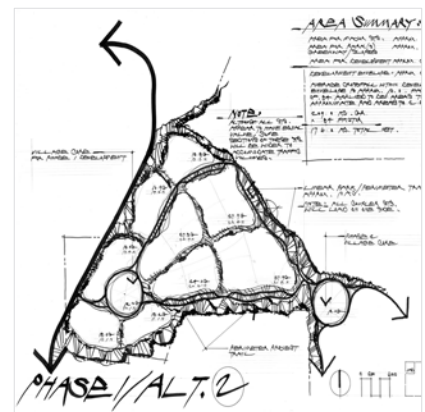
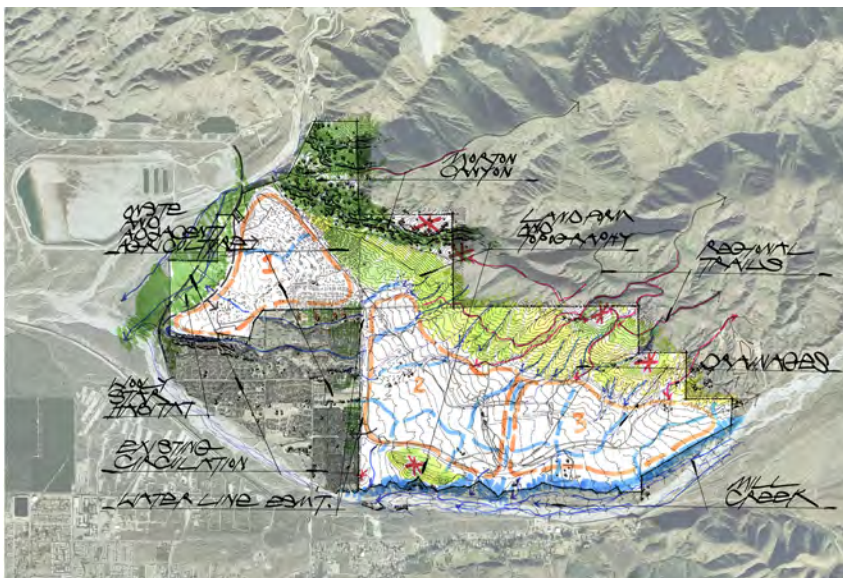
Project Type	Master Planned Community
Location	Highland, California
Size	1,650 acres
Client	City of Highland
Date Completed	Ongoing
Services Provided	Site Planning, Grading and Landscape Planning, Development Capacity Analyses, Visioning, Programming, Land Planning, Community Design, Development Standards, Branding



PlaceWorks is in the process of developing a master plan for Harmony on the eastern edge of the City of Highland. This former orange grove site, also known as Greenspot, represents the greatest development potential in the city. PlaceWorks has prepared grading concepts, conceptual land use plans, and a land capacity analysis to inform the various next steps in the master planning process.

Harmony is envisioned to accommodate clusters of development to establish unique enclaves and leave intact the majority of the natural topography. The project is expected to provide a range of residential product types and densities, neighborhood commercial uses, private and public recreation facilities, and a school. The community will be connected through a system of pedestrian paseos. The vision and master plan for Harmony will provide links to the site's agricultural heritage and the surrounding natural beauty.

The project is in progress and the images are conceptual.



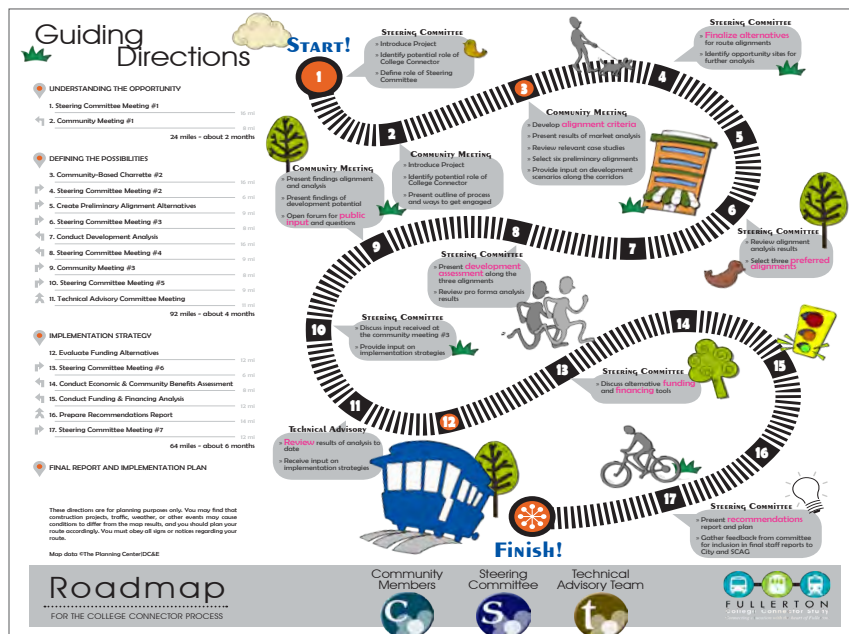
FULLERTON COLLEGE CONNECTOR STUDY

Connecting Education to the Heart of Fullerton

Project Type	Streetcar/Trolley Feasibility Study
Location	Fullerton, California
Size	5-mile study area
Client	Southern California Association of Governments and the City of Fullerton
Date Completed	In Progress
Services Provided	Land Use Analysis, Market Analysis, Economic Development Strategy, Outreach, Visioning, Sustainable Transit Planning, Development Planning, Urban Design



PlaceWorks is working with the City of Fullerton to create a public transit system connecting the university area with the Fullerton Metrolink station and downtown. This system will encourage private investment, accommodate population growth, maximize sustainable operations, and enhance the city's quality of life. The Fullerton College Connector Study will identify various transit routes and select the best route based on physical and financial feasibility, potential ridership, applicable transit technologies, and public input. New development opportunities and financing/funding strategies will be explored to support the potential connector and future growth along the transit corridor. A major component of the project is extensive public outreach using community workshops, social media, and a dedicated project website. Our involvement in both the Fullerton College Connector Study and the CollegeTown Specific Plan enables us to better provide the city with creative strategies appropriate to its unique context.



Levels of Agreement

☐ 5 I strongly support this recommendation.
+ I am enthusiastic about the recommendation and I am confident that it expresses the best wisdom of the group.

☐ 4 I support this recommendation.
+ I support this recommendation, and I think it is the best choice of the options available to us.

☐ 3 This recommendation is okay.
+ I may not be especially enthusiastic about it, but I can accept the recommendation and feel the process has been fair and inclusive.

☐ 2 I do not agree with this recommendation.
+ I am uncomfortable with this recommendation, but I can live with it.

☐ 1 I dislike this recommendation.
+ I do not like this recommendation, but I am willing to defer to the wisdom of the group and promise not to sabotage it.

☐ 0 I cannot support this recommendation.
+ I will not support this recommendation for reasons that I have stated to the group.

DE ANZA REVITALIZATION PLAN

Reimagine, Repurpose, and Revitalize

Project Type	Revitalization Plan
Location	San Diego, California
Size	170 acres
Client	City of San Diego
Date Completed	In Progress
Services Provided	Plan Preparation, Outreach, Environmental Review



PlaceWorks is leading a three-year, comprehensive outreach, planning, and environmental program to reimagine, repurpose, and revitalize a 170-acre area on Mission Bay. The planning effort includes an extensive multipronged outreach program to work with the community and stakeholders to develop a conceptual revitalization plan, amendments to the Mission Bay Park Master Plan, and an environmental impact report. The outreach program includes stakeholder interviews, monthly ad-hoc (steering) committee meetings, quarterly open house community workshops, pop-up events in Mission Bay Park, a project website and interactive online forum, social media, online contests, and decision-maker workshops. The project will hold a design team charrette to develop a series of development plan alternatives; conduct a financial feasibility analysis and solicit community input to test those alternatives; and ultimately, select a preferred plan that will constitute an amendment to the Mission Bay Park Master Plan.



Key challenges of the project include balancing a diverse range of strong recreation, environmental, and economic interests and addressing physical constraints such as lack of connectivity, stormwater pollution, erosion control, and sea-level rise. Amendments to the Mission Bay Park Master Plan constitute amendments to the Local Coastal Program, so PlaceWorks will also be responsible for coordinating with and obtaining approval and certification of the EIR from the California Coastal Commission.





VISITACION VALLEY COMMUNITY GARDEN

A Healthy Corridor for Habitat and Urban Agriculture

Project Type	Landscape Architecture
Location	San Francisco, California
Size	0.55 acres
Client	Trust for Public Land
Date Completed	2007
Services Provided	Landscape Architecture, Urban Agriculture, Community Outreach and Facilitation, Trail Planning, Accessible Design



Working with the Trust for Public Land (TPL), PlaceWorks redesigned an existing community garden in San Francisco's Visitacion Valley neighborhood. Continuing our earlier work on the Visitacion Valley Greenway; a project designed to provide educational opportunities, pedestrian connectivity, and open space amenities for community members; PlaceWorks helped gardeners plan for clearly-defined public access and gathering areas while improving individual garden plots. Hummingbird and butterfly paintings along the greenway complement the water-efficient, edible plantings in the garden. PlaceWorks coordinated with the City of San Francisco's Park and Recreation Department to incorporate the City's new standards for community garden elements and with the Mayor's Office on Disability to provide increased accessibility to and through the site. Site furniture was created by reusing salvaged concrete.





TREASURE ISLAND URBAN FARM DESIGN

Creating a Farm to Table Culinary Training Facility

Project Type	Landscape Architecture
Location	San Francisco, California
Size	400 square feet
Client	Treasure Island Job Corps Center
Date Completed	2010
Services Provided	Urban Agriculture, Architecture, Landscape Architecture, Green Roof Design



PlaceWorks provided a full range of design services, from schematic designs through construction documents, for two accessory buildings and a chicken coop at the Urban Farm on San Francisco's Treasure Island. The Treasure Island Job Corps Center is a federally funded program that provides vocational training to low-income teenagers and adults, with programs ranging from carpentry to the culinary industry. As part of an expansion of the Center's Urban Farm facility, PlaceWorks designed a farm stand with a living roof, a chicken coop, and an exterior kitchen for preparation of meals by culinary students and staff, as well as for use during local festivals. PlaceWorks completed the project on an extremely fast schedule, and assisted the Job Corps throughout construction, including finding and making extensive use of salvaged and recycled materials.

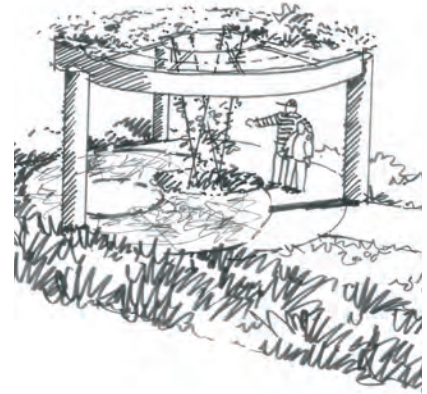




IDEASCAPE EXHIBIT DESIGN PLANNING

Interactive Environmental Demonstration Area

Project Type	Landscape Architecture
Location	Roseville, California
Size	1 acre
Client	City of Roseville Parks and Recreation
Date Completed	on hold
Services Provided	Energy Efficiency, Environmental Education/Interpretation, Exhibit Design, Landscape Architecture, Parks, Public Participation, Site Planning



PlaceWorks prepared a master plan for IDEAScape, a 1-acre outdoor Interactive Demonstration Environmental Area adjoining the City of Roseville's new LEED™-certified Utility Exploration Center in Mahany Park, a 225-acre community park that receives well over 500,000 visitors a year. The IDEAScape Master Plan provides a vision for creating a vibrant and inspiring educational experience, including practical take-home messages on how to reduce dependence and impacts on our natural resources. As part of the team led by Leslie Stone Associates that is further refining the Master Plan, PlaceWorks assisted with the development of interpretive and interactive elements for formal and informal education in a naturalistic setting. The IDEAScape project will be playful, entertaining, and delightful, and the plan will convey a strong understanding of the interpretive, technical, aesthetic, and ecological issues that must be considered together to create an engaging educational experience. The project is currently on hold pending financial support.



The Frontier Project

Owner: Cucamonga Valley Water District

Location: Rancho Cucamonga, CA

Description and accomplishments: The Frontier Project is a 14,200 SF sustainability demonstration building, LEED Platinum certified, that assists in educating resident consumers, commercial builders, and sustainable advocates about the latest methods and technologies in water, energy, and site conservation. In partnership with the 501(C)3 non-profit Frontier Project Foundation and the Cucamonga Valley Water District, HMC Architects developed strategic predesign services, including branding, strategic partnering, media and press kits, as well as all efforts related to soliciting partnership and generating awareness of the project's educational and design goals within the community. In addition, HMC's team of designers and LEED Accredited Professionals provided LEED certification, design, project management, construction documents, and construction services.

The Frontier Project provides a forum for education on the choices we make when we build, and the dramatic affects our choices have on the environment. Built over an 18-month period, the project is the result of a strong vision and close collaboration shared between the client, design team, and construction team.

The design strives to go beyond the norm of sustainable buildings as merely machines of green technologies by combining architectural and ecological design principles as equal forces in the formation of the building. The project shows how sustainable design can be economical, efficient and inviting by demonstrating innovations for Southern California living and working environments.

Despite the harsh desert climate, the indoor air temperature sustains a comfortable level by using the passive cooling tower system during summer months. Two solar chimneys, combined with the centralized cool tower, act as the respiratory system of the building by providing evaporative cooling and natural ventilation. The layering of building shells further optimizes the indoor comfort level. The outer shell, constructed of insulated concrete forms, acts as thermal mass to protect the building from the solar heat. The second shell is a cast-in-place concrete wall that provides lateral integrity to the building structure. The third shell, a north-facing curtain wall, maximizes diffused daylight and visual connection into the building. The inner shell is made of salvaged redwood from the local winery, and shades the south-facing wall of the office and conference wing.

The interior spaces are natural light-filled showcases of architectural materials—terrazzo floors sparkling with recycled glass chips, carefully detailed cabinetry and flooring of rapidly renewable bamboo, and highly textured insulated concrete walls contrasted against the warmth of FSC-certified wood-grille ceilings and reclaimed redwood. The main exhibition hall is open and fluid, maximizing flexibility and interconnectivity for ventilation and daylight. Expanses of glass create a constant visual link to the natural environment outside. Educational displays and signage throughout the building give visitors an understanding of all the green strategies employed in the project.



Health and Human Services Agency Zero Net Energy (ZNE) Facility

Owner: County of San Diego

Location: Oceanside, CA

Description and accomplishments: The Health and Human Services Agency's commitment to promote wellness, self sufficiency, and a better quality of life to families inspired our team to incorporate human-centric strategies throughout the design. To regenerate the workplace environment, the new facility will implement low-impact development standards, use sustainable design principles and practices, and be a shining example of high-performance architecture with minimal environmental impacts. Every aspect of the site, the building, and its systems are designed for the community and its occupants with resilience in mind.



Emphasizing workplace health, productivity, and overall occupant satisfaction resulted in a design that departed from traditional big-box buildings by inviting sun, wind, and light to inspire an experience that informed site planning, building orientation, and indoor environments.

The experience starts with regenerating community place-making by enhancing walkability from the surrounding community. The pedestrian experience focused on behavioral transitions from harsh hardscape environments to soft landscapes that embrace a biophilic approach, which values nature as a colleague in restoring human wellness and mental health.

Bioclimatic design captures environmental conditions to optimize building orientation, heights, window placement, entryways, and outdoor gathering areas. The program was divided into two linear fingers (south wing and north wing) and the entry atrium. This strategic planning decision gives all programs access to southern and northern light, and views so building occupants are always connected with nature's rhythms.

Choreographing daylight rhythms deep into the space was accomplished with narrow floor plates, clerestory windows, light shelves, and solar-shading systems to block unwanted glare while inviting soothing ambient light deep inside. Operable windows optimize the cross-ventilation cooling opportunities during peak summer days, and the central atrium's design generates a negative pressure on the leeward side, turning it into a passive building ventilator to optimize natural ventilation strategies.

Outdoor air circulation is equally important. The two wings are capped by the entry atrium cradling a courtyard protected from onshore winds, providing opportunities for outdoor gathering and socialization. On inclement days, the atrium becomes a cozy gathering space, with nooks to retreat to or gather in groups. Indoor occupant comfort and wellness is consistently activated by providing views to the outside from the entry atrium to one's personal workplace. A central staircase, walkway bridges, and centrally located lounge are embraced with soft ambient light, and always place occupants one step away from the outside.

This positions the Health and Human Services Agency to be recognized by the New Building Institute (NBI) as a Zero Net Energy facility, and by the USGBC as a LEED Platinum building. Forging energy resilience, occupant wellness, and community integration are valued attributes of sustainable development that lead to regenerative futures.

Los Banos Community Center

Owner: City of Los Banos

Location: Los Banos, CA

Description and accomplishments: HMC provided planning and design services for the 34,400 SF community center. Located adjacent to the existing Henry Miller Plaza, the new community center complements the park's outdoor amenities with additional community gathering space. The site, comprised of four buildings and a central courtyard, features a grand room with adjoining kitchen, lobby and reception area, and storage space. The grand room accommodates 470 for dining and 360 for assembly. A separate building houses a multipurpose room with full gymnasium and bleacher seating for 140 spectators, as well as restrooms and sports equipment storage space. A third building houses administrative offices, a senior lounge, fitness studio, game room, an arts and crafts center, and a quiet room. The full-block site also has an exterior barbecue patio, grand-room patio area, a covered walkway between the buildings, and parking lot with drop-off area

"I believe the test of how good a project is comes after living with it and the new wears off. When I walk around the facility today and watch the community and how they're using it, I love it as much today as the day it opened!"

—Steve Rath, City Manager



Woodcrest Library

Owner: County of Riverside Economic Development Agency

Location: Riverside, CA

Description and accomplishments: This contemporary interpretation of the Craftsman style of architecture serves to both honor the history of the region and demonstrate environmental stewardship. Woodcrest Library was Riverside County's first LEED certified building.

The 10,000 SF library rests on two acres of land in the residential Woodcrest area of Riverside County. The single-story building includes a tutoring space, public meeting rooms, offices, patio, covered walkways, and an extensive water-wise demonstration garden. An outdoor reading porch accessible from the entry connects to the water-wise demonstration garden and the natural arroyo for public use.

Exposed wood structure, wood detailing, and stone elements are borrowed from the Craftsman style, as is the melding of the built environment with the surrounding landscape. Native boulders are clustered to create seating areas for instruction about water conservation and the appreciation of natural resources. The terraced site includes an interpretive garden of drought-tolerant plant material and expansive shade trees, which becomes progressively more natural in character as it approaches the streambed.

High-performance features include low-water native landscaping, a permeable parking lot to reduce and use storm runoff, ambient lighting from roof and windows to reduce the use of artificial light, and the use of durable and sustainable building materials. The water-wise garden contains indigenous and adaptive plants that require little water once established. Native boulders are clustered to create seating areas where instruction about water conservation and the appreciation of natural resources may be provided to visiting groups. The expansive use of decomposed granite stabilized with psyllium husk creates a storm-water-permeable surface that allows the natural return of water to aquifers. The building's south elevation is protected from solar heat gain by solar-shading devices in the form of trellises composed of wood certified by the Forest Stewardship Council. These solar-shading devices, used in combination with light-colored paving materials, reduce the heat island effect.



Clearwater Elementary School

Owner: Perris Unified School District

Location: Perris, CA

Description and accomplishments: Stakeholders in the planning process included representatives from the local community, school board members, and district and school representatives. Stakeholders were very hands-on when working through the visioning workshops that led to the most collaborative and sustainable campus Perris ESD has ever built.

This new campus was forged during one of California's most severe droughts on record, and the design team created learning environments that model water conservation. Wetlands basins were created to enhance student understanding of how the site collects and retains stormwater, filters out pollutants, and recharges the basin by reducing run-off using bioswales leading to bioretention ponds. Above-grade cisterns capture rainwater for watering the raised vegetable beds, which provide hand-on opportunities for students to actively participate in the water-wise curriculum. Informational signs placed at strategic points around the campus—and along its perimeter—assist in teaching stewardship not only to students but also to passersby, further integrating the school into the community and extending the water conservation mission.

To fund these critical elements, Eric Carbonnier spearheaded a grant proposal that provided \$982,138 from the California State Water Resources Control Board's Drought Response Outreach Program for Schools (DROPS). Additional environmental education resources and experiences are provided through partnerships with the California Regional Environmental Education Community (CREEC), Inland Empire Water Keeper, and Wild California.

Clearwater Elementary School includes group collaboration spaces, and three outdoor classrooms complete with wet project areas, seating, and shading elements. Flexible spaces are situated in the heart of campus and connected to an outdoor sunken gathering area. Outdoor learning is further reinforced with the inclusion of a community garden, cisterns, and raised planters to promote garden-to-fork opportunities. These water conservation and gardening strategies are intentionally on display, and seeing their immediate usefulness adds a tangible component to the curriculum that students can take home and implement, creating a stronger tie-in with the surrounding community.



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Western Riverside Council of Governments

Administration & Finance Committee

Staff Report

Subject: Agency Visioning Session

Contact: Jennifer Ward, Director of Government Relations, jward@wrcog.us, (951) 955-0186

Date: September 13, 2017

The purpose of this item is to provide an opportunity for Committee member feedback on a proposed Agency visioning session for WRCOG members in October 2017.

Requested Action:

1. Discuss and provide direction.

Background

WRCOG periodically conducts in-depth discussions with its member agencies (aimed at Executive Committee and Technical Advisory Committee, but open to all members) to re-evaluate the Agency's critical goals and priorities. These visioning sessions provide an opportunity for staff to update members on major program progress, as well as analyze challenges or barriers to success. More importantly, it affords the member representatives a dedicated, collaborative forum to discuss whether the Agency is overall "on the right track," or to develop new priorities based on the changing dynamics, future trends, and economic impacts in Western Riverside County.

WRCOG most recently held visioning sessions in October 2012 and 2010, during which the members formulated and re-emphasized the goals and objectives in WRCOG's Sustainability & Economic Development Framework. This Framework, conceptualized in 2010 and strengthened in 2012, has served as a guiding document for WRCOG's activities and has supported the launch of many new initiatives related to healthy communities, economic development, education, as well as continuation of existing programs for transportation, energy and the environment, and water.

Proposed October 2017 Visioning Session

In consultation with Executive Committee Chairwoman Debbie Franklin, staff proposed to host another Agency visioning session, tentatively scheduled for Thursday, October 12, 2017, from 9:00 a.m. to 12:00 p.m. at a location to be determined. Executive Committee and Technical Advisory Committee members are strongly encouraged to attend this meeting.

Time permitting at the September 13, 2017, Administration & Finance Committee meeting, staff will seek feedback from Committee members on the agenda for the proposed visioning session, which would include items such as status update on major WRCOG programs / initiatives; SWOT analysis (strengths, weaknesses, opportunities, threats); facilitated discussion on future agency goals and priorities; and potential new projects for consideration.

Prior Action:

None.

Fiscal Impact:

This item is informational only; therefore there is no fiscal impact.

Attachment:

None.