PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AGREEMENT is entered into this 1st day of July 2017, between the CITY OF STOCKTON, a municipal corporation ("City") and 4LEAF, Inc. a California "C" Corporation whose address is 8896 N. Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Veritas North America, Inc. a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-4200, ("Consultant"), and CSG Consultants, Inc. a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc. a California "S" Corporation whose address is 2400 Camino Ramon Ste. 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

A. Consultant is qualified and experienced in providing on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management for the purposes specified in this Agreement.

B. City finds it necessary and advisable to use the services of the Consultant for the purposes provided in this Agreement.

NOW THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:

1. Consultant's Services. Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). Consultant shall provide said services at that time, place and in the manner specified in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

2. City Assistance, Facilities, Equipment and Clerical Support. Except as set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), Consultant shall, at its sole cost and expense, furnish all facilities and equipment that may be required for furnishing services pursuant to this Agreement. City shall furnish to Consultant only the facilities and equipment listed in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), according to the terms and conditions set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

COS and 4Leaf, Inc. Professional Services Master Agreement
3. **Term.** Consultant shall perform the scope of work as described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), which is attached to this Contract and incorporated by this reference. This Agreement shall commence on the date written above and shall expire on June 30, 2020, with option for up to two one-year extensions with a 3% annual increase; provided, however the parties may agree to change either the commencement or expiration date.

4. **Compensation.** City shall pay Consultant for services rendered pursuant to this Agreement not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Compensation for services and reimbursable expenses shall be paid in an amount not to exceed Four Hundred Eighty Thousand Dollars ($480,000.00) total across all consultants. CONSULTANT acknowledges that this amount includes total compensation across four contracts.

   a. Invoices submitted by Consultant to City must contain a brief description of work performed, time used and City reference number. Payment shall be made within thirty (30) days of receipt of Consultant’s invoice and approved by City.

   b. Upon completion of work and acceptance by City, Consultant shall have sixty (60) days in which to submit final invoicing for payment. An extension may be granted by City upon receiving a written request thirty (30) days in advance of said time limitation. The City shall have no obligation or liability to pay any invoice for work performed which the Consultant fails or neglects to submit within sixty (60) days, or any extension thereof granted by the City, after the work is accepted by the City.

5. **Sufficiency of Consultant’s Work.** All reports, drawings, designs, plan review comments and work product of Consultant shall be adequate and sufficient to meet the purposes for which they are prepared.

6. **Ownership of Work.** All reports, drawings, designs, plan review comments, work product, and all other documents completed or partially completed by Consultant in the performance of this Agreement shall become the property of the City. Any and all copyrightable subject matter in all materials is hereby assigned to the City and the Consultant agrees to execute any additional documents that may be necessary to evidence such assignment. All materials shall be delivered to the City upon completion or termination of the work under this Agreement. If any materials are lost, damaged or destroyed before final delivery to the City, the Consultant shall replace them at its own expense. Consultant shall keep materials confidential. Materials shall not be used for purposes other than performance of services under this Agreement and
shall not be disclosed to anyone not connected with these services, unless the City provides prior written consent.

7. **Changes.** City may request changes in the scope of services to be provided by Consultant. Any changes and related fees shall be mutually agreed upon between the parties and subject to a written amendment to this Agreement.

8. **Consultant’s Status.** In performing the obligations set forth in this Agreement, Consultant shall have the status of an independent contractor and Consultant shall not be considered to be an employee of the City for any purpose. All persons working for or under the direction of Consultant are its agents and employees and are not agents or employees of City.

9. **Termination for Convenience of City.** The City may terminate this Agreement at any time by mailing a notice in writing to Consultant. The Agreement shall then be deemed terminated and no further work shall be performed by Consultant. If the Agreement is so terminated, the Consultant shall be paid for that percentage of the work actually completed at the time the notice of termination is received.

10. **Non-Assignability.** The Consultant shall not assign, sublet, or transfer this Agreement or any interest or obligation in the Agreement without the prior written consent of the City, and then only upon such terms and conditions as City may set forth in writing. Consultant shall be solely responsible for reimbursing subcontractors.

11. **Indemnity and Hold Harmless.** Consultant shall defend, indemnify, and hold harmless, the City and its officers, agents and employees from and against all claims, losses, damage, injury, and liability for damages arising from, or alleged to have arisen from, errors, omissions, negligent or wrongful acts of the Consultant in the performance of its services under this Agreement, regardless of whether the City has reviewed or approved the work or services which has given rise to the claim, loss, damage, injury or liability for damages. This indemnification shall extend for a reasonable period of time after completion of the project as well as during the period of actual performance of services under this Agreement. The City's acceptance of the insurance certificates required under this Agreement does not relieve the Consultant from its obligation under this paragraph.

12. **Insurance.** During the term of this Agreement, Consultant shall maintain in full force and effect at its own cost and expense the insurance coverage as set forth in Exhibit E – Insurance Requirements for Provisions, and shall otherwise comply with the other provisions of Exhibit E.

13. **Notices.** All notices herein required shall be in writing and shall be sent by certified or registered mail, postage prepaid, addressed as follows:
Consultant: 4LEAF, Inc.
Kevin J. Duggan
8896 North Winding Way
Fair Oaks, CA 95628

City: City Manager
City of Stockton
425 N. El Dorado Street
Stockton, CA 95202

Bureau Veritas North America
Craig Baptista
180 Promenade Ci, Ste. 150
Sacramento, CA 95834

CSG Consultants, Inc.
Cyrus Kianpour
1022 G Street
Sacramento, CA 95814

West Coast Code Consultants, Inc.
Giyan Senaratne
2400 Camino Ramon Ste. 240
San Ramon, CA 94583

14. **Conformance to Applicable Laws.** Consultant shall comply with all applicable Federal, State, and Municipal laws, rules, and ordinances. Consultant shall not discriminate in the employment of persons or in the provision of services under this Agreement on the basis of any legally protected classification, including race, color, national origin, ancestry, sex or religion of such person.

15. **Licenses, Certifications and Permits.** Prior to the City’s execution of this Agreement and prior to the Consultant’s engaging in any operation or activity set forth in this Agreement, Consultant shall obtain a City of Stockton business license, which must be kept in effect during the term of this Agreement. Consultant covenants that it has obtained all certificates, licenses, permits and the like required to perform the services under this Agreement.

16. **Records and Audits.** Consultant shall maintain all records regarding this Agreement and the services performed for a period of three years from the date that final payment is made. At any time during normal business hours, the records shall be made available to the City to inspect and audit.

17. **Confidentiality.** Consultant shall exercise reasonable precautions to prevent the unauthorized disclosure and use of City reports, information or conclusions.

18. **Conflicts of Interest.** Consultant covenants that other than this Agreement, Consultant has no financial interest with any official, employee or other representative of the City. Consultant and its principals do not have any financial interest in real property, sources of income or investment that would be affected in any
manner of degree by the performance of Consultant’s services under this Agreement. If such an interest arises, Consultant will immediately notify the City.

19. **Waiver.** In the event either City or Consultant at any time waive any breach of this Agreement by the other, such waiver shall not constitute a waiver of any other or succeeding breach of this Agreement, whether of the same or of any other covenant, condition or obligation.

20. **Governing Law.** California law shall govern any legal action pursuant to this Agreement with venue for all claims in the Superior Court of the County of San Joaquin, Stockton Branch or, where applicable, in the federal District Court of California, Northern District, Sacramento Division.

21. **No Personal Liability.** No official or employee of City shall be personally liable to Consultant in the event of any default or breach by the City or for any amount due Consultant.

22. **Exhibits.** All exhibits referred to herein are attached hereto and are by this reference incorporated herein.

23. **Scope of Agreement.** This writing constitutes the entire Agreement between the parties. Any modification to the Agreement shall be in writing and signed by both parties.
THIS AGREEMENT executed the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

GENE BARRY - VICE PRESIDENT
KEVIN J. DUGGAN
PRESIDENT

CSG CONSULTANTS, INC.

CHARLES H. WEAVER - SECRETARY
CYRUS KIANPOUR
PRESIDENT

BUREAU VERITAS NORTH AMERICA, INC.

CRAIG BAPTISTA
PRESIDENT
ANDREA COLEY
Director of Operations

WEST COAST CODE CONSULTANTS, INC.

WILLIAM R. McGUIRE
Regional Manager
CHRIS ROSE - OPS MANAGER
GLYAN SENARATNE
PRESIDENT

ATTEST:

BONNIE PAIGE
CITY CLERK

APPROVED AS TO FORM:

Taryn N. Jones
Deputy City Attorney

[COS and 4Leaf, Inc. Professional Services Master Agreement]
City of Stockton
Building Services Division
100 Stockton Ave., Room 3
Stockton, CA 95404
Attn: Tracy LaBarber, Community Development

April 19, 2017

Subject: Qualifications to Provide On-call Plan Review and Inspection Services, Engineering
Plan Review, and Floodplain Management.

Dear Ms. LaBarber,

4LEAF, Inc. (4LEAF) is excited to have the opportunity to submit our proposal to provide professional On-
Call Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management Services
for the City of Stockton. 4LEAF has been providing these services for numerous public and private clients
in California for more than 17 years and is looking forward to the opportunity to continue to provide these
services for the City. 4LEAF is the ideal choice for the following reasons:

☑ Depth of Resources
Regardless of the type of personnel you are looking for, 4LEAF has the depth of resources to provide
staff on short notice. 4LEAF has a proven track record of providing building officials, inspectors,
permit technicians, and plan review engineers typically within 24 hours of request. 4LEAF has the
largest pool of inspectors in the industry (more than 100 inspectors) and has the desire to serve any
building, fire inspection, or plan review need the City of Stockton may have, regardless of duration.
The City of Stockton will have access to 4LEAF’s comprehensive plan review team which includes
Engineers, Architects, Fire Inspectors / FPE’s, and ICC-Certified Plan Review staff.

☑ Approach
Our staff incorporates the right combination of experience, education, certifications, and
registrations, allowing the 4LEAF team to provide a wide range of resources customized to the
specific requirements of each client and project. 4LEAF principals and project managers have the
experience to handle any requests. You can be confident that you will be dealing with staff that
understands your department and service protocols. Our approach to providing professional On-
Call Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management
Services to the City is straightforward:

- Provide you with a lineup of highly-qualified professionals who know how to partner
  successfully with the City.
- Supply proven resources and innovative ideas.
- Offer resource reliability and flexibility.
- Respond to your needs.
- Communicate with you honestly and candidly.

☑ Comprehensive Plan Review Services
4LEAF is one of the Building & Safety industry’s leader in providing professional plan review. 4LEAF’s
plan review services include:

- Structural Engineers and Mechanical/Electrical/Plumbing Plan Review Staff.
- Fire Review.
• Civil Review.
• Less than 24-hour pickup and delivery of all plan reviews performed off site.
• Electronic plan review services.
• Expedited plan review services.
• Hourly plan review.
• Special negotiated discounted rates for large/complex reviews.
• Immediate response from 4LEAF’s project manager or management team on all questions and requests.

☑ Building Inspection Services
4LEAF has the largest group of building inspectors in Northern California. We currently manage four large contracts with large inspection teams of approximately 10 or more staff. Most of these contracts include plan review and inspection with many of the technology giants of the East Bay, South Bay, and Peninsula including, Apple, VMware, Work Day, and Sybase (SAP). These projects range from the several million to billions of dollars of construction valuation in those cities/state agencies. 4LEAF also has a proven track record of providing staff as-needed including staffing for short-term assignments including one day assignments to cover staff training, sick days, vacation days, or spikes in permit activity.

☑ CASp Expertise
4LEAF has approximately 10 Certified Access Specialists on staff. We have performed CASp inspection and plan review projects and have consulted on numerous construction projects for accessibility questions and advice.

☑ Leadership
The contract with the City of Stockton will be managed by Joseph Nicolas, P.E., Joe has a proven track record of success with cities and counties neighboring the City of Stockton. Joe’s contact information is as follows:

4LEAF, Inc.
8896 North Winding Way
Fair Oaks, CA 95628

Office: (916) 965-0010
Cell: (916) 200-9959
Email: jnicolas@4leafinc.com

4LEAF looks forward to working with the City. If you have any questions, please do not hesitate to call us.

Respectfully submitted,
4LEAF, Inc.

Kevin J. Duggan
Vice President
Experience Summary

Joe has more than 30 years of experience with both structural design and code compliance for large-scale projects as well as being a Project Manager on collaborative code review and building design projects. While leading the Plan Review Staff of more than 45 at the City of Sacramento, Joe had oversight of large public and private developments. These projects included the $10 Million renovation of Sacramento's Historic City Hall; and high-rise buildings including the $650 Million, 53-story, Towers Building on Capitol Mall; and the $138 Million, 39-story Aura Residential Towers. Having worked for 4LEAF for over 7-years, Joe has been the Project Manager for major projects for the Judicial Council of California - Administrative Office of the Courts, the City of Cupertino - Main Street Cupertino, for Stanislaus County - Capital Improvement Projects, and several other projects.

Select Work Experience

4LEAF, Inc.

Senior Engineer / Senior Project Manager

For more than eight years, Joe has been responsible for the management of 4LEAF's plan review operation. Joe has crafted and managed a team of highly successful engineers and MEP staff of more than 20 personnel to work with numerous local clients including the City of Sacramento, City of Folsom, City of Roseville, City of Galt, Aerojet, and numerous Cities and Counties throughout the Central Valley, East Bay Area, and South Bay Area. Joe has worked on and managed a number of high-profile projects including:

- Wynn Casino, Everett, MA ($2.1 Billion)
- Main Street Cupertino ($300 Million)
- Administrative Office of the Courts ($300 Million)
- Stanislaus County Jail ($90 Million)
- Calaveras County Jail ($68 Million)
- Tuolumne County Jail ($30 Million)

Private Consulting Firm, Sacramento, CA

Director of Plan Review

Joe was responsible for supervising commercial and residential plan review staff on various projects working for developers and various building departments. Among Joe's responsibilities included preparation and administration of division's budget, consulting with developers, architects, and engineers, and communicating the life-safety & structural building codes.
Pacific Engineering
Principal Engineer
Joe managed his own firm and supervised staff during the production of steel fabrication drawings. Joe was responsible for providing structural engineering calculations to support the fabrication division and would consult with developers, contractors, architects, and engineers. His duties also included estimating the materials necessary and steel fabrication costs.

City of Sacramento – Development Services Department
Supervising Engineer
Joe was responsible for supervising the commercial and residential plan review staff on projects needing permits in the City of Sacramento. Joe’s responsibilities included preparation and administration of division’s budget, consulting with developers, architects, and engineers, and communicating the life-safety building codes. He also served as a plan reviewer for mid-rise structural projects, seismic retrofits of existing buildings using the State Historic Building Code and FEMA documents, and had reviewed various apartments and mixed use projects for the Life Safety provisions of the California Building Codes.

County of Sacramento
Associate Engineer
Joe provided his expertise in the building design industry providing structural plan review of commercial and residential buildings. These projects included 2 to 3 story apartments, commercial, residential, and Sacramento County Construction projects.

Buehler & Buehler Structural Engineers, Inc.
Associate Engineer
Joe provided his structural design experience for various projects throughout the Sacramento Region. He has extensive knowledge of the building codes and FEMA documents necessary to design structures. His design experience included the retrofitting of unreinforced masonry buildings, education facilities, healthcare facilities, commercial and residential facilities and parking structures. His experience included structures designed of timber, masonry, concrete, steel mid-rise construction and post tension concrete.

Orland Police Headquarters
Senior Plans Examiner
Existing Historic Building in Orland, California, a 92,000-square foot public safety building, type VB construction, fully sprinklered. Existing reinforced concrete moment frame arches with concrete shearwalls. Project was designed using the 2007 Historic Building Code and the 2007 California Building Code.

Seismic Evaluation and Upgrade
Ruhstaller Building, Sacramento, CA
Supervising Engineer
An early Historic 4600 square foot URM with mezzanine strengthened to meet the “collapse-prevention” performance objective defined in FEMA 310. The lateral system consisted of URM bearing/shearwalls supported by unreinforced brick and concrete footings.
Section 2: Firm Information and Qualifications

4LEAF, Inc. (4LEAF) is a California “C” Corporation that was established in 1999 and incorporated in 2001 by experienced engineers and managers with a focus on providing plan review, project inspection, and on-call inspection services to municipal Building and Public Works Departments. With the goal of setting the industry standard for excellent customer service, 4LEAF has grown to nearly 200 personnel (including more than 100 Building Inspectors with approximately 75 of those full-time) throughout California, Washington, Massachusetts, and Nevada.

Principal/Management Team:
- President: Kevin Duggan  
  (P) – (925) 462-5959 (E) – kduggan@4leafinc.com
- Vice President: Gene Barry, P.E.  
  (P) – (916) 965-0010 (E) – gbarry@4leafinc.com
- Vice President: Bert Gross, P.E.  
  (P) – (916) 965-0010 (E) – bgross@4leafinc.com
- Manager: Joseph Nicolas, P.E. – Primary Contact  
  (C) – (916) 200-9959 (E) – jnicolas@4leafinc.com

Bay Area - Corporate Office
- Principal Office - 47 miles away
- 2110 Rheem Drive, Suite A
- Pleasanton, CA 94588

Sacramento Office – Principal Office - 56 miles away
- 8896 North Winding Way
- Fair Oaks, CA 95628

San Diego Area Office
- So. CA Office
- 402 West Broadway, Suite 400
- San Diego, CA 92101

Washington Office
- 1201 Pacific Avenue, Suite 600
- Tacoma, WA 98402

Massachusetts Office
- 35 Spaulding Street, 1st Floor
- Everett, MA 02149

4LEAF Consulting, LLC
- 125 E. Reno Ave. Suite 3
- Las Vegas, NV 89119

4LEAF maintains the largest database of qualified personnel of varied qualifications.

<table>
<thead>
<tr>
<th>Title</th>
<th># of Staff</th>
<th>Title</th>
<th># of Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICC Certified Plans Examiners</td>
<td>25+</td>
<td>ICC Certified Inspectors &amp; Inspectors of Record</td>
<td>100+</td>
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<tr>
<td>ICC Certified Building Officials</td>
<td>10</td>
<td>Registered Architects</td>
<td>3</td>
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<tr>
<td>Registered Engineers (PE, SE)</td>
<td>20</td>
<td>ICC Permit Technicians</td>
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<tr>
<td>Code Enforcement Staff (PC832)</td>
<td>8</td>
<td>CASp</td>
<td>10</td>
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<tr>
<td>Construction Managers/Inspectors</td>
<td>18</td>
<td>OQP/QSD</td>
<td>3</td>
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4LEAF has a proven track record of reviewing and inspecting projects of all sizes and complexities including:
- Biotech Facilities
- Refinery Facilities
- City/County-Owned Facilities
- Site Work
- Large Campuses
- Water Front
- Stadiums/Arenas
- Health Care Facilities
- Commercial Office Parks
- Transportation Facilities
- Detention/Criminal Justice Facilities
- Commercial Shopping Centers
- Essential Service Facilities
- High-Profile Type B Commercial Construction
- Laboratories
- Large-Scale Residential / Master Planned
- Military Projects
- Multi-Family Projects
As an experienced firm, 4LEAF has approaches to working with clients that are very different from those you might find when working with a large corporation. Our philosophy is to strive to be the best firm providing our clients with outstanding customer service and first-rate plan review and inspection services. 4LEAF has been the industry leader in providing Building Department Services to public and private clients throughout California. **4LEAF has provided plan review and inspection services for numerous projects including office campuses, parking garages, transportation facilities, city-owned buildings, universities, public schools, hospitals, sports arenas, infrastructure, essential service facilities, solar projects, and laboratories. 4LEAF has also performed thousands of plan reviews on residential properties and tenant improvements.**

4LEAF’s staff has a depth of experience in working with all types of building structures and has performed inspection and plan review services on more than $25 billion dollars in construction during the past 15 years. We have worked with planning and building departments in the construction, rehabilitation, and repair of both public and private buildings as well worked with design review and preservation boards to determine the design criteria and associated project requirements of building improvements. In addition, our staff have performed inspections and plan reviews for public and private building structures for compliance with life-safety and Americans with Disabilities Act (ADA) accessibility requirements.

### Basic Services Provided by Firm

<table>
<thead>
<tr>
<th>Building Department Services</th>
<th>Construction Management and Public Works Inspection</th>
<th>Engineering / Environmental Services</th>
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<tbody>
<tr>
<td>• Jurisdictional Inspectors</td>
<td>• Constructability Reviews</td>
<td>• Phase I &amp; II Environmental Assessments</td>
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<tr>
<td>❖ Residential</td>
<td>• Baseline Schedule Review</td>
<td>• Storm Water Pollution Prevention</td>
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<tr>
<td>❖ Commercial</td>
<td>• Stakeholder Coordination</td>
<td>• CERCLA and RCRA Remedial Investigation Work Plans</td>
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<tr>
<td>• OSHPD/DSA Inspectors of Record</td>
<td>• Submittals &amp; RFI’s Review</td>
<td>• NPDES Permitting and Compliance</td>
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<tr>
<td>• ICC Certified Plan Review</td>
<td>• Performing Claims Analysis</td>
<td>• Engineering Cost Estimates</td>
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<tr>
<td>• California Certified Accessibility Specialists (Inspection &amp; Review)</td>
<td>• Public Works Inspection</td>
<td>• Geotechnical Engineering</td>
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<tr>
<td>• Lead Accredited Professionals</td>
<td>• Construction Monitoring &amp; Reporting</td>
<td>• Soil Characterization &amp; Waste Profiling</td>
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<td>• ICC Certified Building Officials</td>
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<td>• Health &amp; Safety Plans</td>
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<tr>
<td>• Complete Building Department Services</td>
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<tr>
<td>• In House Plan Review</td>
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<tr>
<td>• Offsite Plan Review</td>
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<tr>
<td>• Property Condition Surveys</td>
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### Firm’s Financial Stability

4LEAF is a financially-stable company and many of our contracts are multi-year, which provides a large base for stability, a significant backlog of funding, and support of many in-house resources. **During the past 18 years, 4LEAF’s reputation for technical excellence and corporate integrity has allowed us to grow our staff and expand our services into new areas.** We presently have seven offices located throughout California, Nevada, Massachusetts, and Washington, and a staff of nearly 200 certified and licensed Engineers, Architects, Construction Managers, Inspectors, and Administrative staff available to serve our clients.

### Sub-consultants

4LEAF does not require the use of sub-consultants.
Project Management Team

As your consultant, we understand that our role is to be an advocate on behalf of the City of Stockton (City) and represent the City’s best interests. 4LEAF’s team will function as an extension of City staff, seamlessly integrating with the personnel and practices established by the City while adding the perspective and expertise that only 4LEAF can offer. Our goal, which we have successfully accomplished on previous clients’ projects, is to have our staff integrate with yours and be accepted as an essential part of the City.

**Primary Contact: Lead Project Manager – Joe Nicolas, P.E.**

This contract will be managed by our Project Manager, Joe Nicolas, P.E. Joe is responsible for Municipal Client management including staff recruitment, hiring, and the placing for Building Department clientele for positions like permit/counter staff, building official, plans examiners, residential inspectors, commercial inspectors, and inspection services for complex commercial developer funded projects.

Joe is a California registered Civil Engineer with more than 30 years of experience with both structural design and code compliance for large-scale projects. While leading the Plan Review Staff of more than 45 at the City of Sacramento, Joe had oversight of large public and private developments. These projects included the $10 million renovation of Sacramento’s Historic City Hall; and high-rise buildings including the $650 million, 53-story, Towers Building on Capitola Mall; and the $138 million, 39-story Aura Residential Towers. Having worked for 4LEAF for over 9 years, Joe has been the Project Manager for many projects for the Judicial Council of California - Administrative Office of the Courts, the City of Cupertino - Main Street Cupertino, Stanislaus County - Capital Improvement Projects, and several other projects.

All Inspection requests can be made to Joe Nicolas, P.E. Joe helps collectively manage the entirety of 4LEAF’s Building and Safety Services Division that includes up to 150 employees, including more than 100 Inspectors. Whether the request ranges from full-time to part-time assignments, Joe will take the request, schedule the personnel, and confirm with the City all the pertinent details of the scheduling (i.e. time, dates, scope of service). Joe has work with numerous local clients including the City of Sacramento, City of Folsom, City of Roseville, City of Rohnert Park, City of Healdsburg, Town of Tiburon, City of Galt, Aerojet, and numerous Cities and Counties throughout the North Bay Area, East Bay Area, South Bay Area and the Central Valley.

Joe will discuss with the Building Department the exact personnel that are available at the time of request and give the Building Official several options. Availability will also depend on the length of assignment. 4LEAF has several local candidates available immediately – 4LEAF’s Building Department Organization Chart is included at the end of this section. Staffing includes:

- Project Inspectors
- Full-Time and Part-Time Building Inspectors
- Code Enforcement, Building Officials, Permit Technicians, etc.
- On-Call daily requests (24 hours notification or less)
- Fire Inspectors
- CASp Inspections/Consulting

Joe Nicolas, P.E.
Senior Engineer
(916) 965 – 0010 – Office
(916) 200 – 9959 – Cell
jnicalos@4leafinc.com
Plan Review Project Manager – Melissa Dubovik, P.E.

The plan review portion of this contract will be managed by Melissa Dubovik, P.E. She will be responsible for coordinating the distribution of reviews to our plan review staff and managing the content of the reviews throughout Quality Control Checks. Melissa manages a comprehensive team of structural and non-structural plans examiners who work on a variety of residential, commercial, and industrial projects throughout the region and services such clients as the: City of Sacramento, City of Folsom, City of Roseville, City of Galt, City of Rocklin, City of Ranch Cordova, Aerojet Rocketdyne, UC Davis Design & Construction Management, and numerous Cities and Counties throughout the North Bay Area, East Bay Area, South Bay Area and the Central Valley.

Melissa is a California registered Civil Engineer with more than eleven years of experience providing plan review and engineering services on numerous projects. Melissa’s responsibilities include reviewing initial and subsequent submittals of structural and non-structural building plans for conformance of residential, commercial and essential service projects to the California Building Code (CBC) applicable at the time of submittal; composing plan check comment letters for projects, and performing independent calculations to verify project calculations.

Melissa Dubovik, P.E.
Supervising Plan Review Engineer
(916) 965 – 0010 – Office
(916) 479 – 2403 – Cell
mdubovik@4leafinc.com

Organizational Chart

Kevin J. Duggan
President
Principal In-Charge

Joe Nicolas, P.E.
Plan Review Project Manager

Melissa Dubovik, P.E.
Plan Review Project Manager

Inspectors of Record
Martin Scott, OSHPD, DSA
Roy Shortreed, OSHPD
Rick Russell, DSA
Lee Grant, OSHPD, DSA
Korwyn Peck
Chris Fowler, OSHPD
Bill Asbell, OSHPD, DSA
Brian Clark, OSHPD
Keith Marshall, DSA
Brian Clark, OSHPD
Steve White, OSHPD
Ray Palma, OSHPD, DSA

Building Inspectors
Korwyn Peck
Bill Aiken
Mike Peschel
Lucas Chapman
Rick Watson
Robert Hambrecht
Emilio Torres
Curtis Tibodeau
Ed Pilling
Paul Kennedy
Don Huttell
George Davis, MCP
Kevin Bentley
Doug Ray
Martin Redmond

Building Inspectors
Fred Culley, CBO
Ed O'Neil, CBO
Scott Wurglick, CBO
Jose Martinez, CBO
Patrick Gunning, CBO
Greg Adams, CBO
Chris Fowler, CBO
Greg Johnsen
Jeffery Rocca
Korwyn Peck
Mike Emery
Ron Stevens
Jay Cheney
Joe Stack
Mark Johnston

Plan Review Engineers AIA
Joseph Nicolas, PE
Stefanie Hinson, P.E.
Kathy Bucarelli, P.E.
Scott Martin, P.E.
Kevin Sorensen, S.E.
George Rodriguez, AIA
Lucian Gunter, AIA
Keith Long, AIA
Melissa Manucci, S.E.
David Chung, P.E.
Steve Hadley, AIA
Mike Anderson, P.E.
Yousof Abdou
Aleck Cheney, P.E.
Ana Akin, P.E.

Fire Review/Inspection
Gib Mouch, FPE
Flora Chen, FPE
Chris Fowler
John Sheffa
Vincent Fung
Mark Gustafson

CASp
David Chung, CASp
David Rasha, CASp
Frank Bannone, CASp
Brent Hipsher, CASp
Mike Anderson, CASp
Scott Wurglick, CASp
Jerry Thome, CASp
Howard Conroy, CASp

More than 75 additional staff Available.

On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management for the City of Stockton
Section 2: Firm Information and Qualifications
Page 4 of 13
April 20, 2017
## Project Team Qualifications

The following are snapshots of 4LEAF’s Plan Examiner and Inspector personnel lists. As a Project Manager, Joe Nicolas has direct supervision and the ability to compile the right team of staff that will be tailor to the needs of the City of Stockton.

### 4LEAF Plan Review Personnel:

4LEAF has **30 plan check personnel** that includes Registered Professional Engineers, Licensed Architects, Certified Access Specialists, and ICC Certified personnel dedicated to performing plan review services to our municipal clientele. Should duplicate names appear in our competitor’s submittals, we are prepared to show payroll records to ensure you that all names listed in this proposal are employees of 4LEAF, Inc.

<table>
<thead>
<tr>
<th>Plans Examiners</th>
<th>Registrations &amp; Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Mennucci, S.E.</td>
<td>Registered Structural Engineer</td>
</tr>
<tr>
<td>Albert Kong, S.E.</td>
<td>Registered Structural Engineer</td>
</tr>
<tr>
<td>Mike Anderson, P.E., CASp</td>
<td>Registered Professional Engineer &amp; CASp</td>
</tr>
<tr>
<td>David Chung, P.E., CASp</td>
<td>Registered Professional Engineer &amp; CASp</td>
</tr>
<tr>
<td>Kathy Bucciarelli, P.E.</td>
<td>Registered Professional Engineer &amp; 2 ICC Certifications</td>
</tr>
<tr>
<td>Ana Akin, P.E.</td>
<td>Registered Professional Engineer &amp; 2 ICC Certifications</td>
</tr>
<tr>
<td>Joseph Nicolas, P.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Melissa Dubovik, P.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Stefanie Hionis, P.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Anastasios Hionis, P.E., M.E., E.E.</td>
<td>Registered Professional Engineer, Mechanical and Electrical Disciplines</td>
</tr>
<tr>
<td>Constantine Shuitalbar, P.E., PHD</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Alec cherry, P.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Sareh Deyhimi, P.E.</td>
<td>Registered Professional Engineer &amp; 1 ICC Certification</td>
</tr>
<tr>
<td>Scott Martin, P.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Lucian Gunter, AIA</td>
<td>Registered Architect</td>
</tr>
<tr>
<td>Keith Long, AIA</td>
<td>Registered Architect</td>
</tr>
<tr>
<td>Steve Haidet, AIA</td>
<td>Registered Architect</td>
</tr>
<tr>
<td>Youssef Abdou</td>
<td>Degreed Engineer</td>
</tr>
<tr>
<td>Yousef Marmosh, P.E., M.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Peter Oliver</td>
<td>ICC Certified Plans Examiner</td>
</tr>
<tr>
<td>Joseph Espinoza</td>
<td>ICC Master Code Professional</td>
</tr>
<tr>
<td>Martin Redmond</td>
<td>ICC Certified Plans Examiner and 9 ICC Certifications</td>
</tr>
<tr>
<td>Joseph Espinoza</td>
<td>ICC Certified Plans Examiner and 8 ICC Certifications</td>
</tr>
<tr>
<td>Madhavi Latha</td>
<td>Degreed Engineer &amp; ICC Certified Plans Examiner</td>
</tr>
<tr>
<td>Kevin Sorensen, S.E.</td>
<td>Registered Professional Engineer</td>
</tr>
<tr>
<td>Shilpa Chandersenka, AIA</td>
<td>Registered Architect</td>
</tr>
</tbody>
</table>

### Fire Review:

4LEAF works with three different Fire Protection Engineers for fire review projects such as sprinklers, alarm systems, and other fire-related consulting items. The Fire Protection Engineers are provided below and resumes are available upon request.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vincent Fung, P.E.</td>
<td>Registered Professional Engineer, Fire Protection Engineer</td>
</tr>
<tr>
<td>Flora Chen, P.E.</td>
<td>Registered Professional Engineer, Fire Protection Engineer</td>
</tr>
<tr>
<td>Gib Moush, P.E.</td>
<td>Registered Professional Engineer, Fire Protection Engineer</td>
</tr>
</tbody>
</table>

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On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management for the City of Stockton

Section 2: Firm Information and Qualifications

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April 20, 2017
4LEAF Inspector Database:
Below is a snapshot of 4LEAF's on-call inspection database. Should duplicate names appear in our competitor’s submittals, we are prepared to show payroll records to ensure you that all names listed in this proposal are employees of 4LEAF, Inc.

<table>
<thead>
<tr>
<th>Inspectors</th>
<th>Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christopher Fowler, CBO</td>
<td>Certified Building Official, OSHPD A &amp; 25 ICC Certifications</td>
</tr>
<tr>
<td>Rory Shortreed</td>
<td>OSHPD A &amp; ICC Commercial Building Inspector</td>
</tr>
<tr>
<td>Martin Scott</td>
<td>OSHPD A &amp; DSA 1 Certification</td>
</tr>
<tr>
<td>Ken DeCarlo</td>
<td>OSHPD A &amp; DSA 1 &amp; 5 ICC Certifications</td>
</tr>
<tr>
<td>Brian Clark</td>
<td>OSHPD B &amp; ICC Combination Inspector</td>
</tr>
<tr>
<td>Keith Marshall</td>
<td>DSA 1 Certification</td>
</tr>
<tr>
<td>Mike Leontiades, CBO</td>
<td>Certified Building Official &amp; 9 IC Certifications</td>
</tr>
<tr>
<td>George Davis</td>
<td>Master Code Professional &amp; 36 ICC Certifications</td>
</tr>
<tr>
<td>Ron Stevens</td>
<td>17 ICC Certifications</td>
</tr>
<tr>
<td>Mike Emery</td>
<td>14 ICC Certifications</td>
</tr>
<tr>
<td>Howie Conroy, CBO, CASp</td>
<td>Certified Building Official, CASp &amp; 11 ICC Certifications</td>
</tr>
<tr>
<td>Ed O'Reilly, CBO</td>
<td>Certified Building Official, 10 IC Certifications</td>
</tr>
<tr>
<td>David Rashé, CBO, CASp</td>
<td>Certified Building Official, CASp, 11 ICC Certifications</td>
</tr>
<tr>
<td>Jerry Thome, CBO, CASp</td>
<td>Certified Building Official, CASp &amp; 9 ICC Certifications</td>
</tr>
<tr>
<td>Curtis Tibodeau</td>
<td>9 ICC Certifications</td>
</tr>
<tr>
<td>Lucas Chapman, CBO</td>
<td>Certified Building Official &amp; 11 ICC Certifications</td>
</tr>
<tr>
<td>Emilio Torres</td>
<td>8 ICC Certifications</td>
</tr>
<tr>
<td>Chuck Andrews</td>
<td>8 ICC Certifications</td>
</tr>
<tr>
<td>Patrick Gunning</td>
<td>8 ICC Certifications</td>
</tr>
<tr>
<td>Jeff Rocca</td>
<td>7 ICC Certifications</td>
</tr>
<tr>
<td>Brent Hipsher, CBO, CASp</td>
<td>Certified Building Official, CASp &amp; 6 ICC Certifications</td>
</tr>
<tr>
<td>Scott Wungluck, CASp</td>
<td>CASp &amp; 6 ICC Certifications</td>
</tr>
<tr>
<td>Chris Pallares</td>
<td>5 ICC Certifications</td>
</tr>
<tr>
<td>Greg Adams, CBO</td>
<td>Certified Building Official, 4 ICC Certifications</td>
</tr>
<tr>
<td>Kevin Brenton</td>
<td>6 ICC Certifications</td>
</tr>
<tr>
<td>Martín Redmond</td>
<td>4 ICC Certifications</td>
</tr>
<tr>
<td>Ed Pilling</td>
<td>3 ICC Certifications</td>
</tr>
<tr>
<td>Doug Ray</td>
<td>Degreed Engineer, 2 ICC Certifications</td>
</tr>
<tr>
<td></td>
<td>More than 75 additional ICC Certified Inspectors</td>
</tr>
</tbody>
</table>

Permit Technicians:
4LEAF has a proven track record of providing Permit Technician/Counter staff to jurisdictions throughout California. The 4LEAF pool of talented professionals includes qualified and experienced permit technicians, capable of providing all permit processing and counter services.

<table>
<thead>
<tr>
<th>Inspectors</th>
<th>Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minnie Arredondo</td>
<td>ICC Certified Permit Technician</td>
</tr>
<tr>
<td>Tracy Evenson</td>
<td>ICC Certified Permit Technician</td>
</tr>
<tr>
<td>Danny Solano</td>
<td>Permit Technician</td>
</tr>
<tr>
<td>Traci Caton</td>
<td>Senior Project Technician</td>
</tr>
</tbody>
</table>
Experience with Public Agencies and References

4LEAF is the largest provider of Building Department Services. 4LEAF currently supplies more than 100 ICC Inspectors to municipal clients both on an on-call basis or permanent assignment. 4LEAF also performs a multitude of plan review services for these clients both on-site and from our 4LEAF office locations.

City of Sacramento, CA
Plan Review Services & Inspection Services

Joe is the 4LEAF Project Manager providing the City of Sacramento Plan Review, Field Inspection, and Permit Processing services. 4LEAF has established a collaborative working relationship with the City’s Community Development Department. Joe knows the City’s processes and procedures, and takes pride in providing excellent customer service and technical expertise.

Project Highlights

Q19 Apartments
An exciting project that 4LEAF has recently collaborated with the City on is the review of a new mixed use building located in Sacramento’s vibrant Midtown. 4LEAF performed the Life Safety, Accessibility, Structural, Plumbing/Mechanical, & Electrical reviews of this 4-story, 64,000 sq. ft. building with a valuation of $6.6 million. 4LEAF worked closely with both the City and design team to guide the project through a phased permit and an alternative means and materials method request to bring the project to full approval on an expedited timeline.

California Family Fitness, K Street
One of the most interesting City projects that 4LEAF reviewed in the past several years was the California Family Fitness project on K Street. This project is on the revitalized K Street Corridor and is a renovation of an existing unreinforced masonry building that had no as-built or drawings. The 31,000 sq. ft., 4-story, Type IIA, A-3/B occupancy building is a $4.5 million project for which 4LEAF performed Life Safety/Accessibility/Structural/Plumbing/Mechanical/Electrical reviews. We collaborated closely with the City’s Project Manager and the design team to work through some difficult design constraints which required the submittal and approval of an alternate material and methods of construction.

Hobby Lobby, Arden Way
4LEAF performed all plan reviews for the new, $5 million, 55,000 sq. ft., single-story, Type V-B Hobby Lobby store. We worked closely with the City’s Project Manager in order to meet some very tight construction schedule constraints.

Client Name: City of Sacramento
Project Dates: 2001 - Present
Client Contact: Winfred Deleon, Building Official
Client Telephone: Office: (916) 808-5475
Client Address: 300 Richards Blvd., 3rd Floor, Sacramento, CA 95811
Contact Email: WDeleon@cityofsacramento.org
ATTACHMENT A

City of Roseville, CA

Plan Review Services & Inspection Services

4LEAF is contracted to provide Plan Review Services for the City of Roseville Building Department. 4LEAF was one of three firms chosen during the selection process at the end of 2011 to help assist with overflow and third party plan reviews as needed.

The City of Roseville has tasked 4LEAF with the review of many production homes in various new subdivisions, including Fiddyment Ranch, Westpark Village, and Foothills American Dream throughout our tenure as one of their consultants.

Topgolf

4LEAF worked very closely with both the City of Roseville and the design team throughout the entire review process to ensure that this unique project was completed on a tight deadline. Our team provided a comprehensive review, including that of an alternative means and materials method request, of this entertainment complex.

Client Name: City of Roseville
Project Dates: Since 2012 - ongoing
Client Contact: Scott Byrnes, Chief Building Official
Client Telephone: Office: (916) 774-5332
Client Address: 311 Vernon Street, Roseville, CA 95678
Client Email: SByrnes@roseville.ca.us

City of Healdsburg, CA

On-Call Plan Review and Inspection Services

4LEAF currently provides as-needed building inspection and plan review services for the City of Healdsburg which features an affluent community of high-value real estate both residentially and commercially.

Project Highlights

4LEAF is currently serving the City of Healdsburg with on-site plan review services. 4LEAF provides a plans examiner three days per week to work at the City and provide over-the-counter plan check and permitting services to the community in order to ensure the City is able to maintain a proper customer service turn-around and attention to detail.

Agency Name: City of Healdsburg
Project Dates: 2016 - Present
Client Contact: Barbara Nelson, Planning & Building Director
Contact Telephone: Office: (707) 431-3482
Client Address: 401 Grove Street, Healdsburg, CA 95448
Contact Email: B Nelson@ci.healdsburg.ca.us
Miscellaneous jurisdictional inspection assignments
Since 2007, 4LEAF has provided several combination inspectors to assist the City staff with routine daily inspections for commercial and residential properties located throughout Palo Alto. Our inspection services vary from full-time to temporary part-time staff to help augment vacation or extended absences due to illness and/or market demand.

On-Site Plans Examiners
Since 2010, 4LEAF has provided on-site plans examiners for the City of Palo Alto. All Plans Examiners are registered Engineers in the State of California and are responsible for reviewing larger projects between $100,000 to $50,000,000 under the direction of the Chief Building Official. In addition, they will also assist the Permit Counter with over-the-counter plan reviews and general questions from the public. Some of the most recently reviewed projects include Skype, Stanford Medical Center, Technology Credit Union, and VMware.

Inspection Services (Project Specific)
4LEAF also provided the Project Inspector on the City of Palo Alto new Mitchell Park Library and Community Center under Turner Construction Management. 4LEAF is responsible for performing combination inspections and the project is on track for LEED Gold Certification. The project consists of a new 56,000 sq. ft. joint facility that will replace the two former facilities. The new Mitchell Park Library and Community Center is a highly sustainable joint-use facility that will be a vibrant destination for civic, cultural, social, educational, and recreational activities.

4LEAF provided the building inspection services on the Taube-Koret Campus for Jewish Living. This project replaced the old Sun Microsystems space and made way for a 8.6 acre and $350 million mixed used facility which included Senior Housing, Gymnasium, in-door and outdoor swimming pools, parking structure, theatre, school, etc. This project won several awards and was a huge benefit to the community.

4LEAF provided two full-time inspectors to the VMware campus. This project is a $1.3 billion expansion project at the Stanford Research Park. This project includes construction of an extensive expansion and renovation of the current corporate office campus totaling approximately 800,000 sq. ft. and three (3) parking garage structures for approximately 2,900 stalls. This project is pending LEED Certification.

Annual Contract Value: ~$2,000,000

Client Name: City of Palo Alto
Project Dates: 2007 - Present
Client Contact: Peter Pirnejad, P.E., Director of Development Services
Client Telephone: Office: (650) 329-2550
Client Address: 285 Hamilton Ave. Palo Alto, CA 94301
Contact Email: Peter.Pirnejad@CityofPaloAlto.org
ATTACHMENT A

4LEAF, INC.
ENGINEERING & CONSTRUCTION MANAGEMENT
BUILDING INSPECTION + PLAN CHECK

City of Cupertino, CA

On-Call Plan Review, Fire Plan Check, and Inspection Services

4LEAF is currently performing on-call building inspection, plan review, and fire plan review services for the City of Cupertino. 4LEAF has completed numerous residential and commercial plan reviews on behalf of the City.

Apple Campus 2
4LEAF is currently providing the Building, Fire, and Public Works Department Inspection services on the largest private commercial construction project in the Country. 4LEAF has been tasked with mobilizing a project team of more than 20 Building, Fire, and Public Works Inspectors, Project Administration Staff, and Engineering team for this more than $6 Billion project. 4LEAF is responsible for coordinating the inspections in relation to the City’s permits and ultimately packaging milestones of the project for occupancy approval from the City’s Chief Building Official. This project includes several different buildings on Campus to include:

Main Street Cupertino Project
4LEAF is currently performing a review on the Main Street Cupertino Project. The 17.4 acre Downtown Cupertino project includes 130,000 square feet of retail space, 100,000 square feet of office space, and 160 units of high-end senior Housing. This project is a collaborative effort working closely with the City of Cupertino, the design professionals and the developer. This project includes:

Site Description / Master Plan

- Main Street Cupertino Encompasses 17.4 Acres
- 130,000 Square Feet of Retail
- One Acre European Inspired Public Square
- 100,000 Square Feet of Class A Office
- 150 Room Hotel
- 150+ Units of High-End Senior Housing

Annual Contract Value: $4,000,000

Agency Name: City of Cupertino
Project Dates: 2010 – Present
Client Contact: Albert Salvador, P.E., C.B.O., Chief Building Official
Client Telephone: Office: (408) 777-3328
Client Address: 10300 Torre Ave, CA 95014
Contact Email: AlbertS@Cupertino.org
ATTACHMENT A

4LEAF, INC.
ENGINEERING, CONSTRUCTION MANAGEMENT
BUILDING INSPECTION, PLAN CHECK

City of Dublin, CA
On-Call Plan Review, Code Enforcement, and Inspection Services

4LEAF has an on-call contract with the City of Dublin Building Department to provide third-party plan review, code enforcement, and inspection services. 4LEAF is responsible for work being performed within the City's jurisdiction on projects ranging from major new development areas to capital improvement projects and infill development. 4LEAF has supplied as many as 14 continuous staff to the City of Dublin over the course of this ongoing contract.

4LEAF has performed plan review and inspection services of the Ross Corporate Campus located in Dublin, CA. To date this includes the tenant improvements of 3 three-story buildings totaling approximately 360,000 sq.ft.

Building department style plan review includes a Structural Review, Building (life-safety) Review, Accessibility / ADA Review (performed by a Certified Access Specialist), Energy Compliance/Title 24 Review, and Plumbing/Mechanical/Electrical Review. All final submitted project documents must be wet stamped and signed by the project's registered engineer(s) or licensed architect(s) per State of California regulations.

4LEAF inspection staff members have provided combination building inspection services for some of the City’s most important commercial projects including shopping centers, parking garages, big-box retail stores, medical centers, libraries, and countless capital improvement projects. 4LEAF inspection staff members have also provided combination building inspection services on numerous high-density residential projects which routinely required Type V one-hour inspections. These projects include:

- Ulfert’s Center
- Grafton Station
- Gateway Medical Center
- Avalon Bay
- Persimmon Place
- Tassajara Ranch
- Emerald Place
- City of Dublin Library
- Dublin Ranch
- Wallace Ranch

Sizes:
5120 Hacienda – 100,000 Sq. Ft.
5130 Hacienda – 100,000 Sq. Ft.
5140 Hacienda – 100,000 Sq. Ft.
Valuation: $68 Million
Turn-Around: 3 Weeks
Consultant Fee: ~$25,000
Occupancies B and A-3

Annual Contract Value: $1,200,000

Agency Name: City of Dublin
Project Dates: 2002– Present
Client Contact: Gregory Shreeve, C.B.O., Chief Building Official
Client Telephone: Office: (925) 833-6620
Client Address: 100 Civic Plaza, Dublin, CA 94568
Contact Email: Gregory.Shreeve@ci.dublin.ca.us

On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management for the City of Stockton
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4LEAF provided complete code review services for the following projects:

- Barracks Replacement
- Coroner Facility
- Psychiatric Facility
- Public Safety Center Projects 1, 2, and 3

**Project Examples**

**Public Safety Center Projects 1 & 3**

- **Project One (Maximum-Security/Medical/Mental Health Housing Units)** - Includes two maximum-security housing units (240 beds each), special needs housing unit, medical and mental health housing unit (72 OSHPD- licensable beds), health services facility, and security administration, to be funded 90% by Assembly Bill/AB 900 Phase II funding and 10% by County matching funds.

- **Project Three (Intake, Release, Transportation)** - Includes various support facilities to be funded entirely by County funds through funds set aside from Public Facility Fees.

These projects consist of 135,200 square feet (sf) of housing, treatment, and program space on approximately 9 acres of the greater 127± acres of County-owned land on which the County’s existing Public Safety Center is located. Projects One and Three will include two new buildings constructed primarily of steel and concrete for security and long-term durability. Project One will be a jail expansion, approximately 101,600 sf, that includes two maximum security adult detention housing units, one medical/mental health housing unit, a health services unit, a security administration (control) center, and all necessary circulation and common space. Project Three will be an intake, release, and transportation center, approximately 33,600 sf. Both of these facilities will be dependent on the existing, adjacent facilities for several core operational components, including kitchen and laundry services; offender intake, release, and transportation; and

<table>
<thead>
<tr>
<th>Client Name:</th>
<th>County of Stanislaus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Location:</td>
<td>200 E. Hacket Rd, Ceres, CA</td>
</tr>
<tr>
<td>Client Contact:</td>
<td>Patricia Hill Thomas, COO</td>
</tr>
<tr>
<td>Client Address:</td>
<td>1010 10th Street</td>
</tr>
<tr>
<td></td>
<td>Modesto, CA 95354</td>
</tr>
<tr>
<td>Client Phone:</td>
<td>(209) 525-6333</td>
</tr>
<tr>
<td>Project Cost:</td>
<td>$100 Million</td>
</tr>
</tbody>
</table>

**Key Personnel**

- Scott Martin, PE – Structural Review
- Craig Tole – Consultant PM
- Joe Nicolas, P.E. – Code Review
- Mike Anderson, P.E., CASp – Code
City of Monterey, Portola Hotel and Conference Center

Plan Review Services

4LEAF performed plan review for the 102,000 Sq. Ft. Portola Hotel and Conference Center on behalf of the City of Monterey for the major renovation of the existing City-owned Conference Center originally constructed in 1977. 4LEAF reviewed these plans in less than 4 weeks and performed numerous subsequent re-checks of the review. In addition, 4LEAF’s Project Management team also met with the City and design team to assist in the process.

4LEAF’s plan review consisted of:

- Life Safety and Master Exiting Plan Review determining compliance to the 2013 CBC.
- Structural Plan Review determining compliance with the 2013 California Building Code.
- MEP review determine compliance with 2013 CMC, CPC, and CEC.
- NFPA 13 Fire Sprinkler and NFPA 12 Fire Alarm (Deferred).

Plan Review:
Size: 102,000 Sq. ft.
Valuation: $25 Million
Consultant Fee:

Client Name: City of Monterey
Project Location: 1 Portola Plaza, Monterey, CA
Client Contact: John Kuehl, CBO
Client Address: 580 Pacific Street, #4
Monterey, CA 93940
Client Phone: (831) 646-5642
Completion Date: 2016
Contact Email: Kuehl@monterey.org

Key Personnel
Stefanie Hionis, P.E.
Mike Anderson, CASp
Joseph Nicolas, P.E., Project Manager
Melissa Dubovik, P.E.
Plan Review Engineer/ Project Manager

Experience Summary
Melissa is a California registered Civil Engineer with more than eleven years of experience providing plan review and engineering services on numerous projects. Melissa currently assists 4LEAF in the management of plan review efforts including distribution to our Fire Review, Structural Review, and Non-Structural Review personnel.

Select Professional Experience

4LEAF, Inc.

Plan Review Engineer
2012 - Present
Melissa is responsible for coordinating and Project Managing all plan reviews from 4LEAF’s clientele and distributing to the appropriate plan review personnel. Melissa’s responsibilities include reviewing initial and subsequent submittals of structural and non-structural building plans for conformance of residential, commercial and essential service projects to the California Building Code (CBC) applicable at the time of submittal; composing plan check comment letters for projects, and performing independent calculations to verify project calculations.

Buehler and Buehler Structural Engineers, Inc.
Project Engineer
2005-2011
As a project engineer, Melissa designed essential service, educational, commercial (entertainment, office and retail) and multi-family residential buildings. She is experienced with Seismic design experience with codes: 2009 IBC, 2010 CBC, ASCE 7-05, ACI 381-05, AISC 341. Melissa as the ability to complete her own construction documents in AutoCAD or Revit Structural Ability to adapt to clients needs. Melissa’s design experience includes:

- Little Saigon Plaza, Sacramento, CA
- Sutter Memorial Hospital Catheterization lab # 3, Sacramento, CA
- Lincoln Square Plaza, Lincoln, CA
- Offices at Cameron Park, Cameron Park, CA
Mike James Anderson, P.E., CASp
Plan Review Engineer

Experience Summary
Mike Anderson has over 25 years of extensive plan review experience. He has provided architectural and structural plan review services on numerous moderate and complex projects for various jurisdictions and clients in California. His architectural review experience includes both reviewing new construction plans for code compliance and analyzing existing buildings for potential occupants and building owners. This architectural review covers aspects of the California Building Code including occupancy type, rated construction, exiting and accessibility. Mike is not only a professional engineer but also a Certified Access Specialist. Mike is currently responsible for providing architectural and accessibility plan review and office staff oversight for a variety of commercial, industrial, and multi-family residential projects throughout the western U.S. Through many years of project experience and personal contacts in the code industry, he maintains a strong connection with and understanding of the California Building Code. Mike has extensive experience reviewing high-rise and mid-rise projects for the City of Sacramento for conformance with the local building codes and ordinances. He has reviewed apartments, commercial buildings, OSHPD 3 Facilities and assembly occupancy facilities.

Select Project Experience

Plaza Lofts Seven Story Building
Plans Examiner
City of Sacramento, CA
High-Rise with complex rated construction details and Ch.11A accessibility including parking garage, ramps, etc.

Marriott Hotel – Fifteen Story Hotel & Condominium Building
Plans Examiner
City of Sacramento, CA
High-Rise with both CBC Ch. 11A & B accessibility provisions.

RT Metro Repair Facility
City of Sacramento, CA
Industrial structure with multiple other uses including assembly and office.

Carefree Natomas Apartments, Sacramento, CA
Three-story multi-family with clubhouse – 20 building site including full accessibility site analysis.
Experience
35+ years

Education
B.S. Architecture
University of California, Berkeley

Registrations/Certifications
Registered Architect, CA
National Council of Architectural Registration Boards (NCARB)

Professional Affiliations
ICC/CABO Education Committee, Code Development and Review Committee, Plan Review Committee
Commissioner, California State Board of Architects
American Institute of Architects, Central Valley Chapter / Hawaii Society
Construction Specifications Institute (CSI)
National Trust for Historic Preservation
Member, Yolo County Historic Landmarks Commission
Member, Woodland Historical Landmarks Committee
Executive Committee, Downtown Woodland Renovation
Chairman, City of Chico Architectural Review Board
Member, Rotary International

Experience Summary
Keith has over 35 years of experience as a private practitioner with over 1,000 commissions in three states. He has been the Architect of Record for a variety of projects ranging from special studies to technical historical restorations with a strong emphasis in rehabilitation, remodeling and adaptive reuse projects, and new construction in all occupancy groups. He has a proven track record in the design and construction of power generation facilities, and code compliance reviews of single-family and over 2,000 units of multi-family residential projects, medical offices, public works, military, retail and office commercial, banks, restaurants, schools, churches, city halls and council chambers. Keith has extensive expertise with the ICC, IBC, UFC, NEC, UMC and UPC, UCBC, the State Historic Building Code, California Building Code, Title 24 California Electrical Code, and Americans with Disabilities Act. He has authored in-house studies and draft policies such as seismic upgrades for unreinforced masonry buildings, and led numerous training workshops both for city inspection staffs and the general public, in subjects such as truss design and inspection, acoustics in construction, accessibility, code updates and others.

Select Project Experience
Mariposa Energy Project
California Energy Commission / Mariposa Energy
Director of Engineering Services
The Mariposa Energy Project is a natural gas-fired, simple-cycle electrical generating facility rated at a generating capacity of 200 MW. Four General Electric LM6000 combustion turbine generators (CTGs) and associated support equipment are included. A new approximately 0.7 mile long, 230kV transmission line will deliver the plant output to the electrical grid via the existing 230kV substation located north of the project site.
**Abengoa Mojave Solar Project**  
**California Energy Commission / Abengoa Solar, LLC**  
**Director of Engineering Services**  
The project utilizes parabolic trough technology to solar heat using a heat transfer fluid (HTF). This hot HTF will generate steam in solar steam generators, which will expand through a steam turbine generator to produce electrical power from twin, independently-operable solar fields, each feeding a 125 MW power island. The sun will provide 100 percent of the power supplied to the project through solar-thermal collectors.

**Genesis Solar Energy Project**  
**California Energy Commission / NextEra Energy Resources, LLC**  
**Director of Engineering Services**  
The project consists of two independent solar electric generating facilities with a nominal net electrical output of 125 MW each, for a total net electrical output of 250 MW. Electrical power will be produced using steam turbine generators fed from solar steam generators. The solar steam generators receive heated transfer fluid from solar thermal equipment comprised of arrays of parabolic mirrors that collect energy from the sun.

**GWF Tracy**  
**California Energy Commission / GWF Tracy**  
**Director of Engineering Services**  
GWF Energy is modifying the existing Tracy Peaker Plant by converting the existing facility into a combined-cycle power plant with 145 MW of additional generating capacity. The project consists of the power plant, an onsite 230 kV switchyard, an onsite natural gas supply interconnection, an approximately 1,470 foot water supply pipeline and improvements to an existing dirt access road.

**Palomar Power Project**  
**California Energy Commission / San Diego Gas & Electric**  
**Director of Engineering Services**  
The project included a natural gas-fired combined cycle power plant and associated reclaimed water supply and brine return pipelines, two combustion turbine-generators equipped with dry low combustors and evaporative inlet air coolers, two heat recovery steam generators equipped with duct burners, a steam turbine-generator and associated auxiliary systems and equipment. The project also included a new 230 kV switchyard connecting with an existing San Diego Gas and Electric, electric transmission line.

**Colusa Generating Center**  
**California Energy Commission / Pacific Gas & Electric**  
**Director of Engineering Services**  
The Colusa Generating Station is a 660MW combined cycle generating facility. The project is fueled by natural gas which is delivered to the site via a new 8 inch, 1,500-foot pipeline owned and operated by PG&E. Transmission interconnection required four double circuit 230 kV lines that connect to PG&E's existing 230 kV north-south transmission lines located approximately 1,800 feet east of the project site. The project included over 700 submittals for review and approval.
Frank Rainone, CASp
Plan Examiner

Experience
27+ years

Certifications
CASp # 410
Expires 3/09/2018
ICC Certified Accessibility Inspector/Plans Examiner
Expires 12/02/2016
ICC Certified Building Inspector
Expires 12/02/2016
ICC Certified Building Plans Examiner
Expires 12/02/2016
ICC Certified Combination Dwelling Inspector
Expires 12/02/2016
ICC Certified Residential Combination Inspector
Expires 12/02/2016

Experience Summary
Frank is an ICC Certified Building Plans Examiner, Certified Accessibility Inspector/Plans Examiner, and Certified Building Inspector with more than 27 years of experience working within local jurisdictions.

Frank is experienced with the customer service aspects of municipal building department counters and possess a working knowledge to examine plans and specifications for residential and commercial projects to ensure compliance with the California Building Code, California Residential Code, Building, Mechanical, Plumbing, Electrical, and Title 24.

Select Project Experience
4LEAF, Inc.
Plan Examiner
July 2016 – present
Frank is currently preforming plan reviews for many of 4LEAF’s clients. Frank reviews residential and commercial plans for life-safety, plumbing, mechanical, electrical, Title 24 energy, and disabled access.

City of Pleasanton, CA
Plan Checker
Dec 2012 – July 2016
Frank was responsible for the regular plan review and provided over the counter review services as needed. Frank reviewed all phases of residential and commercial construction for MEP, Title 24 energy, and disabled access. Calculated permit and sewer fees as required. Acted as the building official in his absences.

City of East Palo Alto, CA
Building Official
March 2008 – Dec 2012
Frank oversaw the daily operations of the Building Services Division which included but was not limited to; the operating budget, inspections, code enforcement, and the plan check of all non-structural projects. In addition, Frank prepared ordinances for the adoption of the building codes.
Frank implemented the city's first permit tracking system (CRW) for all divisions and departments use. He developed code enforcement requirements including ordinances to provide staff with the additional tools to deal with code enforcement issues. Frank also provided training for the city's inspector and permit techs concerning code and enforcement issues.

City of Sunnyvale, CA  
Plan Check Coordinator  
Dec 1999 – March 2008  
As the plan check coordinator, Frank oversaw the plan review process for the one-stop permit center and all other plan review services provided by the city. As part of the plan review process, he provided reports to the building official concerning plan review accuracy and achieving assigned plan due dates, and was directly involved with the plan review of the more complicated projects such as multi-story residential and commercial buildings. Included with the plan review process was review for mechanical, plumbing and electrical systems, accessibility, and Title 24 energy compliance. Frank was also responsible training the building inspector coordinators and the plan checkers for both plan review and inspections. In addition, Frank was responsible for overseeing portions of the building department’s budget and assisted the building official in the adoption of the building codes. Frank acted as the building official in the building official’s absence.

Frank assisted with and oversaw the more complex inspections related to the larger building projects within the city. He conducted meetings on all types of building projects and met with developers, owners, architects and contractors to resolve construction related and plan review issues.

City of Sunnyvale, CA  
Sr. Building Inspector  
Dec 1995 – Dec 1999  
As the Sr. Building Inspector Frank, was directly involved with the plan reviews of the more complicated projects such as; multi-story residential, commercial buildings, and all types of occupancies including hazardous type. Included with the plan review process was review for mechanical, plumbing and electrical systems, accessibility, and Title 24 energy compliance. Frank was also responsible for training the building inspector coordinators and plan checkers for both plan review and inspections. In addition, Frank assisted the building official in the adoption of the building codes, and oversaw the more complex inspections related to the larger building projects in the city.

City of Sunnyvale, CA  
Building Inspector  
Dec 1989 – Dec 1995  
Frank inspected and plan review of all types of construction related to the different occupancy types. Inspections included compliance with the building, mechanical, electrical, plumbing, accessibility features, and Title 24 energy requirements. He also provided plan review on all type of construction.

City of Gilroy, CA  
Building Inspector  
July 1987 – Dec 1989  
Frank inspected all types of construction related to the different occupancy types. Inspections included compliance with the building, mechanical, electrical, plumbing, accessibility features, and Title 24 energy requirements. Frank also provided plan review on all type of construction.
Constantine Shuhaibar, PhD, PE
Structural Review Engineer

Experience Summary
Dr. Shuhaibar is Civil/Structural Engineer and an expert in Building and Structural Design. He will be available to the team as needed for structural design review services. He specializes in performance-based techniques, seismic isolation and damper systems, and seismic risk analysis. Dr. Shuhaibar is also a specialist in Steel Moment Frames and Buckling Restrained Braced Frames. He has been invited to peer review/plan check many new and retrofit designs, such as the landmark high-rise structure 'The Towers' on Capitol Mall in Sacramento.

Select Project Experience

UCSF Hospital, Mission Bay, San Francisco, CA
Dr. Shuhaibar was retained by the general contractor and worked closely with the architects of record on the structural design of a new panelized prefabricated wall system to be used throughout the 870,000 square foot facility. Several schemes were developed and economic feasibility studies are underway. The next step is full scale testing and obtaining Office of Statewide Health Planning and Development (OSHPD) approvals. Dr. Shuhaibar was also asked to value engineer specific repetitive light gauge steel details. Working with DPR Construction, cost effective alternate details were developed and approved by the structural engineer of record and OSHPD.

The Towers on Capitol Mall, Sacramento, CA
Dr. Shuhaibar performed the review of Tower 1 which consists of a hotel with 276 keys with 343 condominium units. Tower 2 consists of 467 condominium units. It is the largest private development in Sacramento history at a height of 615 feet and 53 stories per tower. The structural system is a concrete post-tensioned flat slab with a reinforced concrete "core-only" shear wall in each tower sitting on separate thick concrete mat foundations with more than 3,000 post-tensioned piles. Extensive nonlinear dynamic time history analysis was performed along with a peer review.

Key Qualifications

- **Design**: Strong background in the design of steel, reinforced concrete, and pre-stressed concrete structures per UBC/AISC/ACI.
- **Risk Assessment**: Includes Probable Maximum Loss (PML) and Seismic Risk Reduction Plans
Stefanie Hionis, P.E.
Plan Review Engineer

Experience Summary

Stefanie is a California registered Civil Engineer with more than 10 years of experience providing plan review and engineering services on numerous projects. Stefanie is a LEED Accredited Professional and a member of the Structural Engineers Association of Central California Young Members Forum.

Select Professional Experience

4LEAF, Inc.
Plan Review Engineer
Stefanie’s responsibilities include reviewing initial and subsequent submittals of structural and non-structural building plans for conformance of residential, commercial and essential service projects to the California Building Code (CBC) applicable at the time of submittal; composing plan check comment letters for projects, and performing independent calculations to verify project calculations.

Board for Professional Engineers and Land Surveyors
Subject Matter Expert
Serving as subject matter expert, Stefanie reviewed and approved applications for the Civil Professional Engineers Exam, coordinated with Senior Registrars to address unique applicant questions and applications, communicated with applicants and guided their efforts to finalize incomplete applications, and implemented process improvements in written communication methods to applicants.

Buehler and Buehler Structural Engineers, Inc.
Project Engineer
As a project engineer, Stefanie designed essential service, educational, commercial (entertainment, office and retail) and multi-family residential buildings. She is experienced with timber, concrete, CMU and steel (including light gage) construction utilizing the 2001 and 2007 CBC, specialized computer programs, in-house design tools and hand calculations. She performed construction administration, including addendum drawings, RFI’s / SSK’s and structural observations. She coordinated structural support of equipment for Tenant Improvements (TI’s), school modernizations and medical equipment upgrades in hospitals and medical office buildings. Stefanie analyzed conditions and capacities of existing structures for ASCE 31 protocol as member of design team, and controlled design schedules by drafting smaller projects in AutoCAD. Stefanie mentored younger engineers and was a member of in-house LEED committee.
Scott Martin, P. E.
Plan Review Engineer

Experience Summary
Scott has more than 18 years of structural engineering experience. Scott has performed a multitude of plan reviews for many different disciplines including OSHPD 3, DSA Projects, and various municipal reviews for clients throughout California. Scott’s day-to-day activities include the review of plans submitted to local jurisdictions, creation and submission of plan check letter, and constant communication with all project stakeholders. In addition, Scott was often tasked with the education of building code to applicants.

Select Professional Experience
4LEAF, Inc.
Structural Plan Check Engineer
2012 - Present
Starting in December of 2013, Scott has recently accepted a position to perform and manage plan reviews in the Central Valley and Central Coast for many of 4LEAF’s clientele. Since 2012, Scott has worked for 4LEAF as a structural plans examiner and has been tasked to the City of Palo Alto. Scott was often assigned to the counter to work with the public and architects to answer building code related questions and to provide excellent customer service. In addition, Scott performed many large-scale plan reviews for the City including:

- Stanford Medical Center (6 Stories) - $32 Million
- VMware HTE tenant improvement - $25 Million
- Hilton Hotel and Underground Parking - $18 Million
- VMware Parking Structure 2 - $14 Million
- Stanford Hospital Site Development - $13 Million
- 260 California (3 Story mixed-use & underground parking) - $10 M
- Thermal Vacuum Chamber - $9.7 Million
- VMware Parking Structure (4 Levels) - $6.8 Million
- 4 Story tenant improvement for Survey Monkey - $6.1 Million
- Merck Corporate Office - $4.9 Million
Wildan Engineering, Fresno, CA
Structural Plan Check Engineer
2007-2010
Scott performed structural plan reviews on behalf of Wildan Engineering for numerous jurisdictions throughout California. Scott was tasked with the plan review, creation of the plan check letter, communicating with project stakeholders, and educating the applicants on current building codes and standards. Some of Scott’s projects included:

- CSU Humboldt Student Center Expansion; Arcata, CA
- Park Place: Res/Office/Retail over Parking; Paso Robles, CA
- CalRENEW-1 Solar Power Farm; Mendota, CA
- City of Winters Police/Fire Complex; Winters, CA
- UC Davis Hyatt Place Hotel; Davis, CA

Advanced Structural Design, Inc., Fresno, CA
Project Engineer
1998-2007
Scott was a Project Engineer for nearly ten years with Advanced Structural Design out of Fresno. Scott was responsible for engineering design, drafting (Autocad & hand), shop drawing review, and coordination with clients.

- Mt. Whitney Classroom Buildings; Visalia CA (DSA #02-107633)
- Plumber’s Union Expansion; Fresno, CA
- Oak Valley New Admin; Tulare County, CA
- Paul Evert’s RV Expansion and New Canopies; Fresno, CA
- Grizzlies Stadium; Fresno, CA
Kathy Bucciarelli, P.E.
Plan Review Engineer

Experience Summary
Kathy has performed a multitude of plan reviews on residential buildings, commercial structures, energy plants, and OSHPD 3 clinics. She is also experienced with the customer service aspects of municipal building department counters and possesses a working knowledge of structural design for commercial and institutional buildings including seismic evaluation and strengthening of existing buildings. Kathy also possesses a working knowledge of structural programs such as SAP and ETABS for static and dynamic analysis, SAFE for slab design, RISA, Excel, and Accela’s Permit Plus.

Select Professional Experience

4LEAF, Inc. – City of San Jose
On-Site Plan Review Engineer
Kathy is currently preforming in-house plan reviews at the City of San Jose. Kathy reviews residential and commercial plans for structural, life-safety, plumbing, mechanical, electrical, Title 24 Energy, and ADA compliance.

4LEAF, Inc. – City of Livermore
On-Site Plan Review Engineer
Kathy provided the City of Livermore with on-site plan review engineering services. Kathy was responsible for all phases of review which includes structural and non-structural review. Kathy primarily worked on projects for the Paragon Outlet mall project on the west side of I-580. Prior to Livermore, Kathy worked on large commercial projects on behalf of 4LEAF for the City of Palo Alto.

West Coast Code Consultants (WC3)
Senior Plan Review Engineer
Kathy was responsible for reviewing plans for the Cities of Walnut Creek, Pittsburg, Emeryville, Hayward, Mountain View and various other Bay Area jurisdictions. The scope of reviews included residential and commercial buildings, OSHPD 3 clinics and energy plants for Structural, Life Safety, T-24 Accessibility, Title 24 Energy, Plumbing, Mechanical, and Electrical compliance.
Bureau Veritas / LP2A, Pleasanton, CA

Plan Review Engineer

Kathy was responsible for reviewing plans for various Cities such as Cupertino, Palo Alto, Los Altos, Dublin, Walnut Creek, Los Gatos and Downey. The scope of reviews included residential and commercial plans mainly for Structural compliance and some Life-Safety, Plumbing, Mechanical and Electrical, Title 24 Energy and T-24 Accessibility.
Yousef S. Marmosh, P.E.

Mechanical and Plumbing Review

Executive Summary
Yousef Marmosh is a Registered Professional Engineer with more than 40 years of experience in a broad range of design and engineering of buildings mechanical systems for a variety of commercial, institutional, correctional, educational, industrial, medical facilities, power plants and water transmission systems. He also has extensive expertise in directing design development of construction documents and construction administration through systems startup and commissioning and setting up maintenance management systems.

Selected Project Experience

4LEAF, Inc.
Plan Review Engineer
2014- Present
Yousef recently joined 4LEAF in April of 2014 as a Plan Check Engineer. Yousef will help in the management and performance of plan review for of 4LEAF’s plan review clientele and assists in the development of 4LEAF’S Structural Engineers and Non-structural review staff.

MET California Group LLC.
Engineering Consultants
Principal Engineer
2012-2014
Yousef was the consultant’s Principal Engineer. He was responsible for supervising all aspects of design of HVAC, plumbing, energy conservation, steam systems and fire protection systems from initial design to project completion, final shop drawings, and project punch list. He also provided engineering services to a variety of industries in the area of design, construction management, and facility management.

Kiewit Infrastructure Group
 Consultant from MET California Group
Quality Control
2012
Yousef was the Quality Control Manager for this project. He was responsible for overseeing the quality control process for Crystal Spring water project – coordinating the construction quality control effort with the owner (City of San Francisco), the designers and the inspection group (HDR) through Apex Testing laboratories. The project includes the new potable water pumping plant and piping system from the Crystal Springs reservoir to the City of San Francisco.
Ana Akin, P.E.
Plan Review Engineer

Experience
30 years

Education
B.S. Civil Engineering
University of California, Berkeley 1978
Structural Drafting Diploma

Certifications
California Civil Engineer/Land Surveyor
No. 31399
ICC Certified Plans Examiner
ICC Certified Accessibility Inspector/Plans Examiner

Experience Summary
Ana has more than 30 years of experience providing structural engineering services for a wide variety of residential and commercial projects. A California registered civil engineer and land surveyor, Anna has coordinated all phases of assigned projects from preliminary design to construction. Ana is an ICC Certified Plans Examiner and Building Code Accessibility/Usability Specialist. Her extensive experience has included managing the plan review and permit counter services for several California municipalities.

Select Professional Experience

4LEAF, Inc. – City of San Mateo
On-Site Plan Review Engineer
Ana is currently performing in-house plan reviews at the City of San Mateo. Ana reviews residential and commercial plans for structural, life-safety, plumbing, mechanical, electrical, Title 24 Energy, and ADA compliance.

4LEAF, Inc. – City of Palo Alto
Senior Plan Check Engineer
Ana is currently performed the role of Senior Plan Check Engineer under the supervision of the Chief Building Official and Deputy Building Official. The scope of in-house plan review included the review of residential and commercial plans for structural, life-safety, plumbing, mechanical and electrical, Title 24 Energy and ADA compliance. In addition, Ana assisted applicants with plan review questions at the Permit Counter. Ana provided several plan check services for the following commercial projects at the City of Palo Alto:

- Ann Taylor Tenant Improvement(TI)
  Ana reviewed the plans for the $375 thousand remodel of 6,800 Ft², including a remodeled mezzanine, new accessible restrooms, new partitions & ceilings, relocation of electrical panels, and new storefront.

- Skype Tenant Improvement - $1.1M
  Ana reviewed phase 2 of Skype's $1.1 Million tenant improvement for 21,000 Ft² of use and occupancy.

- Stanford University Medical Center
  Ana reviewed the plans for the 300 SF office conversions to a medical exam room. Improvements included adding an additional electrical outlet and ADA upgraded bathroom.

In addition to the City of Palo Alto, Ana has also provided Senior Plan Check Engineering Services for the following Cities of Belmont, Burlingame and, Daly City.

4LEAF, INC.
David J. Rashé, CBO, CASp
Building Official / Plans Examiner

Experience Summary

David is a dedicated and proficient code professional with more than 27 years of experience working within Northern California Building Departments. David has held various positions in the building department industry including the positions of Chief Building Official, Permit Center Manager and Program Coordinator. As a Building Official, David successfully managed the annual building division budget to include monthly activity and reconciliation and oversaw the daily operations in the Permit Center and the Building Division to include the permit technician, plan review, inspection, code enforcement, and building division administrative support staff.

Select Professional Experience

4LEAF, Inc.
Building Official, Combination Building Inspector, Plans Examiner
2016 – Present
David has recently joined 4LEAF to work in a number of different capacities including Building Official, Plans Examiner, and Building Inspector.

City of Livermore, Livermore, California
Community and Economic Development Department
Chief Building Official
2014 – 2016 (Retired)

- Oversaw the daily operations in the Permit Center and the Building Division to include the permit technician, plan review, inspection, code enforcement, and building division administrative support staff.
- Developed and maintained the annual building division budget to include monthly activity and reconciliation.
- Implemented and managed consultant contracts for plan review and inspection services.
- Maintained contract services for providing plan review and inspection services to Sandia National Laboratories; Livermore.
- Solved development related code questions as well as explained city standards and policy questions, while interacting with planning, engineering, housing and inspection.
• Consulted with architects, engineers, contractors, and property owners regarding proper design and the methods and materials to be used for building construction in the City.
• Coordinated projects with other City departments.
• Maintained accurate up-to-date records of all plan reviews, plans, inspections and construction in the City.
• Made public presentations to City Council, public agencies, business and civic groups and other organizations.
• Maintained the City Building Codes in compliance with latest model codes and State regulations.
• Prepared wrote reports and requests for City Council or staff regarding ordinance changes, and establishment of City policy related to building requirements.

City of Livermore, Livermore, California
Community and Economic Development Department
Permit Center Manager
2004 – 2014
• Oversaw the daily operations of the Permit Center to include administrative and support staff, permit technicians, planners, engineers, plan reviewers, and inspectors.
• Developed, implemented, and provided sustainability efforts for projects and programs related to customer services and permit streamlining strategies for the Permit Center.
• Coordinated major development projects through the regulatory processes to include planning, zoning, plan review, and engineering.
• Coordinated development projects with architects, developers, engineers, owners, and the general public with interagency teams to facilitate comprehensive reviews.
• Wrote Council staff reports and Resolutions / Ordinances for public policy.
• Prepared Request for Proposals (RFP) for plan review and structural engineering contract services; met with contractors and awarded contracts.
• Reviewed, interpreted, analyzed, and approved design and construction plans, specifications, and reports for conformity to relevant codes, regulations, and policies.
• Prepared budget and other operational reports.

City of Oakland, Oakland, California - 1989-2004
• Community and Economic Development and Public Works Agencies
  Development Process and Program Coordinator
• Community and Economic Development Agency
  Process Coordinator III
• Community and Economic Development Agency
  Permit Technician
Experience
25 years

Certifications
DSA CASp # 422
ICC Certified Combination Building Inspector
ICC Certified Building Official
ICC Certified Combination Inspector
ICC Certified Electrical Inspector
ICC Certified Mechanical Inspector
ICC Certified Plumbing Inspector
Fire Inspector 1A-1D & 2A-2D

Experience Summary
Brent is a certified Building Official with nearly 25 years of construction related experience; ICC Certified Combination Building Inspector as well as two college certificates in Building Inspection, Construction Management, and has a Certified Access Specialist Certification (CASp #422). Brent has worked with a number of different jurisdictions including the Town of Portola Valley, City of Milpitas, City of Dublin, and the City of Palo Alto where he has served in positions as Building Official, Plans Examiner, and Combination Building Inspector.

Select Experience
4LEAF, Inc.
Combination Building Inspector/CASp/Building Official
Brent has recently rejoined 4LEAF as a Combination Building Inspector, Certified Access Specialist, and As-Needed Building Official. Brent has worked with numerous 4LEAF clientele including the cities of Emeryville, Newark, Hollister, Pleasanton, and Fremont to assist with any as-needed building inspections ranging from residential to commercial for all trades.

City of San Mateo
Deputy Building Official/Fire Inspector
For approximately one year, Brent worked at the City of San Mateo in the Building Services division as a Deputy Building Official and Counter Manager where he managed the inspection, plan check, and front counter personnel. Brent also spent several months working with San Mateo Fire as a City Fire Inspector.

Kutzmann and Associates
City of Palo Alto
Building Inspector/Plans Examiner
For approximately seven years Brent worked with the City of Palo Alto as a consultant inspector and plans examiner. Initially, Brent worked in the office as a plans examiner and facilitated customer service related to code questions and over-the-counter plan checks at the Building Counter. Previously, Brent has served the City on a number of residential and commercial inspection projects including:

- HP Executive Center
- Arbor Real (250-unit multi-family)
- Tesla
College of San Mateo
Associate Professor
Brent has been a Professor at the College of San Mateo for the past ten years where he has taught various courses in plan reading, construction practices, and building codes. Brent's current curriculum includes the California Residential Code and Non-Structural provisions of the Building Code.

4LEAF, Inc.
City of Dublin
Contract Building Inspector
Brent served the City of Dublin on behalf of 4LEAF for about one year as a contract building inspector. Brent inspected multi-family and commercial projects in conformance with the current California Building Codes and adopted Dublin Municipal Code. At the time, Dublin was one of the fastest growing Cities in the Country and a multitude of construction projects.

Additional Experience

City of Milpitas, Building and Safety Division
Plans Examiner 2005-2006

Town of Portola Valley
Building Official 1999-2005

Town of Atherton, Building Division
Building Official 1995-1999

City of San Mateo, Community Development Department
Code Enforcement Officer / Building Inspector 1993-1995
Christopher Fowler, CBO, OSHPD A
Senior Combination Inspector / Inspector of Record

Experience Summary

Christopher Fowler has more than 25 years of senior-level commercial construction project management experience, with special emphasis on LEED educational and governmental buildings. He has extensive knowledge of and experience applying, implementing, and enforcing the International Building Codes. Christopher has complete understanding and proficiency with all major construction methods and procedures including hands-on management experience as both a general and subcontractor representative and overseer. He has provided over seven years of educational training programs in coordination Council and for the college curriculums.

Christopher has knowledge of building codes for local, state and federal ordinances – ICC, UMC, UPC, NFPA, NEC, OSHA, ADA and health regulations. Chris has completed several billion-dollar construction projects including:
- Apple Campus 2: $6 Billion
- VMware Corporate Campus: $1.3 Billion
- Correctional Healthcare Care Facility: $1.2 Billion

Select Project Experience

City of Cupertino
Apple Campus 2

Lead Project Inspector

Chris is currently the Lead Project Inspector managing the on-site operations of the Project Team. The construction spans nearly 180 acres and approximately 4 million Sq. Ft. of construction. The campus will include a 2.8 Million Sq. Ft. Main Building with subterranean parking, Corporate Fitness Center, Corporate Auditorium, two above grade Parking Structures, Central Utility Plant, and 600,000 Sq. Ft. of Research and Development Buildings. Chris is responsible for the coordination of inspections as well as the final approval on behalf of the Authority Having Jurisdiction. Chris routinely packages milestones for the City’s Chief Building Official for approval.
California Health Care Facility, Stockton, CA

Senior Inspector of Record

Christopher served as the Senior Inspector of Record for the $1.2 billion and 1.2 million square foot correctional healthcare facility on a 144-acre site. The CHCF-Stockton project provides sub-acute medical and mental health care to approximately 2,870 inmate patients of all security levels. Christopher’s responsibilities included inspection of civil, ADA compliance, structural, mechanical, pumps, pipelines, plumbing, electrical, fire alarm, fire sprinkler, and site work.

Arab Emirates, Department of Municipal Affairs of Abu Dhabi, United

As Independent Contractor, Christopher performed special assignment to ensure that Abu Dhabi’s International Buildings Codes were adopted, implemented, and properly applied and enforced throughout the Emirate of Abu Dhabi. Christopher developed effective policies and procedures to establish a consistent and proper level of code administration and enforcement operations. Christopher also developed and provided continued training programs in coordination with ICC and the DMA. Christopher also assisted DMA personnel in Fire/Life safety and accessibility assessments of existing structures.

County School District, Facilities Division, Las Vegas, NV

Plans Examiner/Code Compliance Inspector/Manager

As Senior Plan Reviewer/Code Compliance Inspector/Manager, Christopher’s duties included supervising, hiring, planning, training, organizing and evaluating the activities of assigned inspection services personnel to ensure building construction projects were in compliance with all plans, specifications and applicable local, state and federal codes, ordinances and regulations, including change order modifications during the design build phase. Scheduled and monitored all inspections of both new school construction and renovations with annual budget exceeding $250 million.

Christopher provided knowledge, skill, and expertise in assessing site area, from initial grading through Certificate of Occupancy, including all construction of buildings, building systems, system commissioning and commercial/common area, as well as building surveys of existing structures for fire/life safety issues. Christopher documented observations and assessments both manually and using job progress computerized management tracking programs.

College of Southern Nevada, Las Vegas, NV

Adjunct Professor

As Adjunct Professor in the Building Technology Department, Christopher instructed students in the fields of Commercial and Residential Building, Plumbing, Electrical, and Mechanical Codes.

Federal Emergency Management Agency (FEMAGCS), New Orleans, LA

Facility Inspector

Christopher served on special assignment to provide post disaster school building damage assessment in greater New Orleans following FEMA response and investigation of Hurricane Katrina.
Lucas Chapman, CBO
Building Official /Senior Combination Building Inspector

Experience Summary
For more than 36 years Lucas has worked from Colorado to California as a Building Inspector, Tradesman, Equipment Operator, and Foreman in heavy construction, residential, commercial, underground, high-rises, and road construction. Lucas is experienced with evaluating construction site conditions, maintaining digital photo files, reviewing change orders and plans, RFIs, reviewing project documents and schedules of value payments, attending staff meetings, interacting with design and construction personnel, assisting in problem solving, preforming commercial and residential inspections, maintaining daily reports using both field notes and computer logs.

Select Professional Experience

4LEAF, Inc. - City of Pinole
Contract Supervising Senior Inspector / Interim Building Official
Lucas is currently serving as the Interim Building Official for the City of Pinole. As Building Official Lucas directs, manages, supervises, and coordinates the activities and operations of the Building and Safety Division within the Community Development Department. Duties include assuming responsibility for implementing City activities related to ensuring compliance with building code standards including plan check, inspections, supervising and performing the more difficult inspections, and approving plans and specifications as necessary.

4LEAF, Inc. - City of Dublin
Contract Supervising Senior Inspector / Interim Building Official
Lucas served for nearly twelve years as a Contract Supervising Senior Inspector, Capital Projects Inspector, and other duties as assigned by the City of Dublin. Lucas supervised nine inspectors and oversaw the inspection of over 600 million dollars' worth of construction. Lucas traveled from site to site performing inspections, supervising inspectors, and reviewing code issues with contractors on commercial buildings, parking structures, residential, multi-family buildings, and private medical facilities. Lucas reviewed Special Inspection companies, preformed plan review, ADA Compliance (T-24), attended staff meetings, organized and runs pre-con meetings, resolved project conflicts and code issues, wrote daily reports, responded to e-mails, provided training for the new California Building Code changes, and
attended code training classes. Lucas helped oversee the entirety of the City of Dublin’s growth and was responsible for such projects as:

- Ulfert’s Center
- Persimmon Place
- More than a dozen Multi-Family Complexes
- Water Parks and Community Parks

Notable Projects while at the City of Dublin

- Historical Park, moved existing building to a new location in the City of Dublin and reassembled using Historical Code. $10 million project.
- Solar City Project, involved new structures over parking lots with solar panels and invertor inspection with Chevron. $25+ million project.
- Aquatic Park with three swimming pools and slides. $33 million project.
- Three building remodels totaling 20,000 sq. ft. per building for Ross headquarters. $20 million project.

Applied Testing Consultants, Chico, CA
Senior Inspector / Inspector of Record
1997-2005

Lucas served more than seven years as the Senior Inspector/Inspector of Record (IOR) on projects for the State of California at Chico State. Projects included Type I and II construction, the Butte County Court House Expansion, Butte County Jail remodel, Yuba County Security Jail, California Fish and Game Construction of new fish screens/pump stations on the Sacramento River, highway & bridge construction, San Francisco Airport extension, residential and commercial plan review, soils compaction, contractor compliance, daily field reports and weekly meetings. In this position Lucas also sampled concrete, conducted concrete brake tests, did batch plant inspections, and inspections on masonry, metal stud, drywall, interior/exterior finishes, electrical, mechanical welding, roofing, fire sprinkler installation, and ADA compliance.

Kleinfelder, Inc., Redding, CA
Special Inspector
1995 – 1997

Special Inspections, field office technician, where Lucas did masonry and concrete observations & sampling, welding inspections, soils compactions, and worked on such projects as the retrofit of the overpass for CalTrans, AC compaction for Highway 5 and the Redding Hospital expansion, reviewed plans and specifications, performed construction observation, contractor compliance, maintained daily field reports and attended construction staff meetings.

California State University Chico Projects
Yolo Hall (PEII) California State University Chico, CA
Special Inspector and Inspector of Record

Lucas preformed the duties of the Inspector of Record and General Site Inspector, his duties included reviewing contract documents, responding to architectural inquiries, adding or deleting information, posting RFI’s and field instructions on current set of As-Builds. $8 million project.
Howard W. Conroy, CBO, CASp
Plans Examiner / Certified Building Official/Building Inspector

Experience Summary
Howard has more than 30 years of experience in the construction industry. Howard has worked as a Building Inspector, Planning Commissioner, General and Specialty Contractor, Building Official, and Project Manager. Howard’s diverse background and extensive experience makes him an ideal fit for various types of projects. Howard has a proven track history of ensuring projects are compliant with current codes with a high quality of workmanship.

In addition to his experience, Howard has also served as the President, Education Chairman, and Coordinator for the Central Coast Chapter of ICC and on the Board of Directors for California Building Officials Training Institute (CBOTI).

Select Professional Experience

County of San Luis Obispo Juvenile Hall Project
Inspector Record
9/2014 - Present
Howard is 4LEAF’s Inspector of Record on a 30 bed detention housing facility with support spaces to an existing 45 bed juvenile hall facility three new buildings and an exterior covered walkway providing approximately 22,800 square feet of additional new housing, recreation yard, classrooms, mental health treatment rooms and offices, training/conference rooms, indoor multi-purpose/recreation, and administrative/teachers office space. The new maximum security housing facility will be a single story building with approximately 7,920 square feet of living space, with 20 single occupancy sleeping rooms. This new housing wing will also include a large day room to be used for eating meals and activities, and (2) Counseling Interview Rooms.

San Benito County
Building Official
2013-2014
Howard served as the Building Official for San Benito County for approximately one year. Howie was responsible for managing building inspection, plan review, code enforcement, and counter
administration. In addition, Howie routinely performed plan review and inspections on projects throughout the County and attended Board meetings as the representative of the Building Division.

City of Santa Maria
Building Inspector II
2008-2013
As a Building Inspector for the City of Santa Maria, Howard was responsible for residential and commercial building inspections and plans examining. Howard worked on various projects throughout the City including a Mobile Home Park Inspection Program as the Lead Inspector and a Neighborhood Stabilization Program as the Construction Coordinator.

JAS Pacific
Building Inspector/Code Enforcement Officer
2007-2008
Howard worked as a building inspector and code enforcement officer for several projects for the company including the Cities of Grover Beach, Guadalupe, Huron, Pismo Beach, and Arroyo Grande. Howard conducted both residential and commercial building inspections as well as plans examining and code enforcement.

City of Atascadero
Building Inspector
2006-2007
Howard conducted both residential and commercial building inspections.

City of Grover Beach
Planning Commissioner
2002-2004

General and Specialty Contractor
Owner
1998-2006
As the owner of this Company, Howard was responsible for the supervision of employees and subcontractors. His duties included project management and coordination and ensuring code compliance.

County of San Luis Obispo
Property Appraiser
1990-1998
Howard served as the Construction Expert and Property Appraiser for the County of San Luis Obispo. He was also responsible for the training of new employees.
Chuck Andrews
Combination Building Inspector

Experience Summary

Chuck is a Certified Combination Inspector through the International Code Council with more than twelve years of construction experience. Prior to joining 4LEAF, Chuck owned and operated a successful contracting firm that specialized in commercial projects ranging in valuation from $200,000 to $500,000 in California and Nevada. Chuck is one of 4LEAF’s Lead Inspectors for the Apple Campus 2 Project on behalf of the City of Cupertino.

Select Professional Experience

4LEAF, Inc.
Lead Project Inspector
2015 - Present
Chuck is one of three Lead Project Inspectors for the Apple Campus 2 project on behalf of 4LEAF for the City of Cupertino. This project is more than $5 billion and is considered the largest private development in the United States. The project includes:

• **Main Building** – The Main Building will accommodate up to 12,000 employees and comprises approximately 2.8 million sq. ft. It is located and designed to minimize the visual impact on adjacent residential neighborhoods and to enhance the existing deep landscape setbacks at the periphery. Campus amenities will include a striking restaurant within the Main Building and 2,300 spaces of below grade parking.

• **Corporate Fitness Center** – Comprising approximately 100,000 sq. ft.

• **Corporate Auditorium** – Comprising approximately 120,000 sq. ft. and will hold up to 1,000 people.

• **North and South Parking Structures** – Two above-grade parking structures of approximately 6,000 spaces.

• **Central Utility Plant** – Integrated parking structure and serves all buildings on the Main Building site.

• **Phase 2 Research and Development Buildings** – 600,000 sq. ft. of office, research and development and two separate above ground parking garages.
A Squared Construction
*Owner/Construction Manager*

**2004-2015**
Chuck was the Owner and Construction Manager of his own Company A-Squared for more than ten years performing work throughout Northern California/East Bay. Chuck performed all functions of the job including the coordination of inspections, approvals, permits, etc. Chuck administered the contracts, subcontracts, schedules, and developed programs to maintain construction quality control to ensure projects were completed on schedule, within budget, and according to company and client specifications.

City of Livermore, CA
*Police Officer*

**2001-2004**
Chuck served the City of Livermore as a Police Officer for four year where he was tasked to maintain order, respond to emergencies, protect people and property, and enforce the motor vehicle and criminal law. Chuck had many responsibilities including testifying in court, present evidence at trials, and interview principles and eye-witnesses.

United Airlines, Oakland, CA
*Supervisor/Airplane Technician*

**1997-2001**
For four years Chuck worked on Boeing 747 and 777 aircrafts where he interpreted specifications, blueprints, and job ordered and constructed templates for workers. He routinely recommended and initiated personnel actions, such as employment, performance evaluations, promotions, transfers, discharges, etc.
Devon Braaten
Combination Building Inspector

Experience
20+ years

Education
Manteca High School, Manteca, CA
Lindbergh School Computer Technology, Manteca, CA
Modesto Junior College, Modesto, CA
CLC Vocational Center, San Rafael, CA
Advanced Inspector Training Center, Anaheim, CA

Certifications
U.S.A.C.E Construction Quality Manager Certification
ICC Certified Electrical Inspector IEC - 5096625-E5
ICC Certified Mechanical Inspector IMC - 5096625-M5
ICC Certified Mechanical Inspector UMC - 5096625-M6
ICC Certified Plumbing Inspector IPC - 5096625-P5
ICC Certified Plumbing Inspector UPC - 5096625-P6
ICC Certified Building Inspector - 5096625-B5
ICC Certified Combination Inspector - 5096625-IUICUSD
ICC Certified Spray Applied Fireproofing - 5096625-88
ICC Certified Reinforced Concrete Special Inspector - 5096625-47
ICC Certified Prestressed Concrete Special Inspector - 5096625-92
ICC Certified Structural Masonry Special Inspector - 5098625-84
ACI - Concrete Field Testing Technician - Grade 1 Pacific Nuclear - Compaction Testing Soil / AC
O.S.H.A Safety Certified Radiographic Testing (RT) assistant certified

Experience Summary
Devon has extensive construction experience in multiple disciplines with in-depth trade and product knowledge. He has more than 20 years of experience within the trades, 13 of which served as a Certified Building Inspector / Code enforcement Officer, and Quality Control Specialist. As a Combination Building Inspector Devon has been instrumental in providing inspection, code enforcement, plans examination and field support in many different cities working privately, as well as for local jurisdictions, including cities of Livingston, Tracy, Patterson, Los Altos, and the County of Santa Clara. Devon inspected projects from as small as single-family dwellings to as large as high-profile crime labs, luxury condo’s, bridges, schools, hospitals and museums. Prior to being a building inspector Devon worked as Special Inspector.

Select Professional Experience

4LEAF, Inc. (City of Tracy, CA)
Combination Inspector
2015 - Present
Devon is currently serving the City of Tracy on behalf of 4LEAF performing combination building inspection services on numerous commercial projects including various warehouses that includes the likes of Amazon. Devon is utilized for his commercial experience and impeccable record keeping.

West Coast Code Consultants
Chief Building Official, City of Livingston, CA
2014 - 2015
Performed supervisory and administrative duties in planning and coordinated the operation of the Building Department Division, which included complex technical duties enforcing construction codes to ensure public safety and health. Performed all inspections, code enforcement, building abatement, and plan review.

Construction Materials Testing
Combination / Special Inspector
2012 - 2014
Reinforced concrete soils structural and combination inspection of variety of projects.
Construction Testing & Engineering, Inc., Sacramento, CA  
*QC Manager / Specialist & Combination Inspector*
*2010 - 2012*
Mechanical, Electrical and Plumbing Inspections including observation / verification of compliance with the contract documents and applicable Building codes.

Consolidated Engineering Labs, San Ramon, CA  
*Senior Resident Inspector / QC Specialist / Combination Inspector*
*2008 - 2009*
Resident Inspector on very high-profile projects; the $750 million Honua Kia luxury Hotel, $700 million DeYoung Asian Art Museum, Golden Gate Park S.F., $450 million, Santa Clara County Crime Lab, Lawrence Livermore National Laboratories, and Waste Water Treatment Plants.

4LEAF, Inc., Pleasanton, CA  
*Inspector II / Combination Inspector / Code Enforcement Officer*
*2007 - 2008*
Provided code compliance inspections for the City of Tracy and City of Patterson, on long list of various projects to verify structural building, mechanical, electrical and plumbing was in accordance with the corresponding building codes and contracted documents.

Construction Testing and Engineering, Inc., Tracy, CA  
*QC Specialist / Inspector II*
*2003 - 2007*
Responsible for documenting compliance with specifications, plans, and codes for numerous projects throughout California.

Consolidated Engineering Labs, Pleasanton, CA  
*QC Specialist / Inspector I*
*2001 - 2003*

CLC San Rafael, CA  
Vocational Training  
*2000 - 2001*

LTM Formworks, San Leandro, CA  
*Carpenter / Laborer*
*2000 - 1997*
General construction suspended concrete, formwork, and carpentry, operation of forklift and other equipment, demolition, and various other duties.
Gib Moush, FPE
Fire Protection Engineer / Plans Examiner

Experience Summary
Gib has more than 15 years of engineering experience, 10 of which have been in Fire and Life-Safety. He is a certified Professional Engineer in Fire Protection Engineering in the state of California, and holds a Bachelor of Science degree in Mechanical Engineering from Louisiana State University.

Gib has supervised the engineering of fire alarms for high rise buildings which have included residential, commercial and multi-occupancy structures. He has designed voice evacuation, smoke control, fire department communications and central command centers. He has also designed special water-based suppression water mist systems.

Gib’s experience as a designer and fire plan reviewer gives him a unique understanding of code compliance through the eyes of a designer.

Select Project Experience

County of Santa Clara, Facilities and Fleet / City of Gilroy
Fire Plans Examiner
Gib has been assisting the County of Santa Clara Facilities and Fleet Division and City of Gilroy through 4LEAF with various fire reviews including Sprinklers, Alarms, etc. per the 2010 California Fire Code. Gib works in-house at the City of Gilroy one day per week. With the County, Gib has performed a collection of large fire reviews including:
- Main Jail North Fire Panel Replacement
- Malech Road Water Supply
- San Jose Downtown Health Center
- The San Antonio Valley Maintenance Facility
- VMC Receiving and Support Center

Livermore Pleasanton Fire Department
Fire Plans Examiner
Gib has been assisting the Livermore Pleasanton Fire Department through 4LEAF with various fire reviews including Sprinklers, Alarms, etc. per the 2010 California Fire Code. Gib has completed more than fifty projects including several fire reviews for the Paragon Outlets in Livermore and the new retirement community in Pleasanton.

St. Joseph’s Parrish, Rio Vista, CA
Senior Plans Examiner
This 15,000 square foot church in Rio Vista is an occupancy classification B, Type V-B, fully sprinklered structure. Gib completed the fire alarm review using the 2010 California Fire Code, the 2010 California Building Code and all applicable NFPA Codes and Standards.
### Section 3: Professional Services Fees

<table>
<thead>
<tr>
<th>Professional Service</th>
<th>Fee</th>
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<tbody>
<tr>
<td>Structural Engineer</td>
<td>$120.00</td>
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<tr>
<td>Civil Engineer</td>
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<tr>
<td>Plan Review Engineer</td>
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<td>Combination Inspection</td>
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<tr>
<td>Permit Technician</td>
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</table>
Section 4: Firm Capabilities

Plan Review
4LEAF plan reviews approximately 2,000 plans each year and has the depth of experience in providing consultant services on a variety of projects. Our project history includes City/County owned properties, laboratories, military projects, transportation projects, office buildings, criminal justice facilities, health care facilities, and high-profile Type B commercial construction projects. Our project history includes:

- Wynn Casino, Everett, MA — ($2.1 Billion)
- Administrative Office of the Courts — ($200 Million)
- City of Cupertino — Apple Campus 2 Parking Garages ($130 Million)
- City of Livermore — Fire/Building Reviews for Paragon Outlet Mall — Phases 1 & 2 ($100 Million)
- County of Stanislaus — County Jail Buildings 1, 2, and 3 ($90 Million)
- City of Cupertino — Main Street Cupertino ($300 Million)
- County of Calaveras — Adult Detention Facility and Administration Building ($68 Million)
- City of East Palo Alto — University Plaza ($65 Million)
- City of Pleasanton — Clorox Campus ($60 Million)
- City of Palo Alto — College Terrace ($50 Million)
- City of Dublin — Ross Headquarters ($50 Million)
- Tuolumne County — Juvenile Detention Center ($35 Million)
- County of Alameda GSA — Ashland Youth Center ($34 Million)
- City of Palo Alto — Stanford Hospital Parking Garage and Visitors Center ($32 Million)
- City of Palo Alto — Park Blvd, Park Plaza ($30 Million)
- City of Monterey — Conference Center Renovation ($25 Million)
- City of Pleasanton — BRE Multifamily ($25 Million)
- City of Palo Alto — VMware ($125 Million)

Project Inspection
4LEAF is the Northern California’s leader in Project Inspection Services. Here is a list of our recently completed or in-progress commercial projects:

**Building Projects**
- Apple Campus 2 ($6 Billion)
- VMware ($1.3 Billion)
- CDCR ($800 Million)
- Taube-Koret CIL ($350 Million)
- UC Merced Phase 1 ($350 Million)
- California Dept. of Parks and Recreation (DPR) ($250 Million)
- St. Joseph’s Hospital, Stockton, CA ($120 Million)
- BART Dublin Station, Dublin, CA ($116 Million)
- Lawrence Berkeley National Lab CRTF ($115 Million)
- Los Angeles Downtown Park ($100 Million)
- Stockton Ball Park and Arena ($100 Million)
- Calaveras County Jail ($68 Million)
- Downtown Health Center, Santa Clara County ($50 Million)

**Public Works Projects**
- Apple Campus 2 ($6 Billion)
- Clark County I-215 Interchange ($50 Million)
- Amtrak Extension, Sac RT ($40 Million)
- America’s Cup Marina ($25 Million)
- Richmond Field Station ($25 Million)
- Yosemite Slough, Candlestick Pt. ($14 Million)
- PG&E Gas Pipeline Replacement ($10 Million)
- Downtown Burlingame Utilities ($8 Million)
- W. Sacramento Capitol Ave ($7 Million)
- W. Sacramento Tower Bridge ($6 Million)
- Auburn Blvd, Citrus Heights ($5 Million)
- City of Cotati Train Depot ($1.7 Million)
- City of Walnut Creek Streetscape ($TBD)
Plan Review Services
4LEAF will provide plan review for any and all types of structures to ensure compliance with all adopted codes, local ordinances (including Tier 1 of Cal Green, if required) and state and federal laws that pertain to Building and Safety, and for compliance with the adopted International Code Council (ICC) Building, Plumbing, Electrical, Mechanical, National Fire Protection codes and standards, and the Accessibility and Noise and Energy Conservation requirements as mandated by the State of California Title 24, State of California Water Efficient Landscape Ordinance, the State of California Certified Access Specialist (CASp) compliance, and all other applicable ordinances. **Types of projects we provide these services for include: Single-Family Dwellings, Multi-Family Dwelling Units, Commercial, and Industrial.**

On-Site Review Work Plan
4LEAF can supply Registered Professional Engineers to the City of Stockton to work on-site performing structural plan review and non-structural reviews at the Jurisdiction’s discretion. 4LEAF currently supplies on-site review to such Municipalities as:

- City of Palo Alto
- City of San Mateo
- City of Livermore
- City of Pleasanton
- Livermore/Pleasanton Fire Dept. (LPFD)
- City of Roseville
- Aerojet, Folsom, CA
- County of San Joaquin
- City of East Palo Alto
- City of Hollister
- City of Gilroy
- City of Sacramento

Off-Site Review Work Plan
4LEAF is able to work effectively with design teams and assist Public Works, Planning, Fire, and Building Departments in the construction, rehabilitation, and repair of both public and private projects. Our experience includes checking for compliance with the structural, life-safety, accessibility, plumbing, mechanical, electrical, fire, and local codes/ordinances.

**Approach**
We understand that specific building plan review responsibilities will include, but are not limited to:

- Examining plans, drawings, specifications, computations documents, soils reports, and any additional data;
- Ascertaining whether projects are in accordance with applicable building and fire codes, and City ordinances, including but not limited to Title 24 and Title 25;
- Performing such reviews as, structural, MEP, green building, fire and life safety, grading and drainage;
- Reviewing plans to ensure conformity to the required strengths, stresses, strains, loads, and stability as per the applicable laws;
- Reviewing plans to ensure conformity with use and occupancy classification, general building heights and areas, types of construction, fire resistance construction and protection systems, means of egress, accessibility, structural design, soils and foundations; and masonry;
- Providing additional plan review services as requested by the City;
- Conducting all plan review at the City Department or, as needed, at a site mutually agreed upon in writing and;
- Supplying all plan review staff with all code books and other basic professional references.
4LEAF Plan Review QA/QC Process for all Reviews

Task 1 - Project Tracking Set-up
The first step of our process will be to set up the project in our system to enable 4LEAF and the City of Stockton to track the progress of the review. Our plan tracking procedures are designed to track each submittal throughout the review process and maintain accurate and comprehensive records for each submittal.

Task 2 - Complete Submittal Review
Upon receiving the plans from the City, 4LEAF will triage (preliminary plan review performed by 4LEAF plan review project lead) the submittal to verify that the submittal received is complete (i.e., all pertinent plans, calculations, reports, and other related documents) in order that we can begin our review. If the submitted package is incomplete, we will communicate with the City to discuss the deficient documents needed to proceed with our review.

Task 3 - Plan Review Assignment
After the triage process is performed and a complete package is verified, the project will be assigned to the most qualified Plans Examiner and a turnaround time will be established. We will log each application into our database the same day the plans are received to assure that they are routed in a timely manner and to allow for daily project tracking.

Task 4 - Plan Review
4LEAF will provide the project contact (Developer, Contractor, Architect, or Engineer) desired by City of Stockton with a list of any items needing correction and clarification to comply with applicable building codes, ordinances, and regulations. A correction list will be created based on the missing codes and ordinances.

Task 5 - Quality Control
Prior to submitting the plan review correction list to the City, the designated plan review project lead will review the correction list for adherence to applicable codes and ordinances as well as for accuracy and completeness. After completion of our quality control review a correction list will be e-mailed to a designated staff member at the City of Stockton or as directed by the City of Stockton. The correction list and a 4LEAF transmittal form will include the following information: a description of the work, type of construction, occupancy group, square footage, number of floors, and sprinkler requirements.

Task 6 - Plan Review Rechecks
Plans received for rechecks will be reviewed for conformance. Our goal is to actively work with the designers to resolve all unresolved issues after our second review. If it appears that there are complicated issues that might cause a project to go beyond our second review, we will communicate directly with the designer to resolve these concerns.

Task 7 - Project Approval
Once the final plan reviews are completed and ready for approval, 4LEAF will organize the plans and supporting documents per the City of Stockton processing requirements and return them to the City, along with our letter of completion.
Turn-Around Times

4LEAF has a tremendous reputation for completing projects on-time and under budget. 4LEAF’s plan review team is widely recognized for quick turn-around times and prompt service. We have provided some elaborate examples in our Experience and Reference section - please read through our project examples and contact our references to learn about our abilities and commitments to our clients. Off-site plan reviews are performed at our office, with plans transmitted by personal delivery or overnight service. The standard turn-around time is within 10 business days for residential plan reviews and within 10 days for commercial/industrial plan reviews; however, these timeframes are negotiable based on your needs. 4LEAF also provides Fire Plan Review services.

<table>
<thead>
<tr>
<th>Type of Plans</th>
<th>Transportation</th>
<th>Initial Review</th>
<th>Subsequent Review</th>
<th>Expedited Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>&lt;24 Hours (pick up &amp; delivery by 4LEAF staff)</td>
<td>&lt;10 Days</td>
<td>&lt;5 Days</td>
<td>Negotiable per project</td>
</tr>
<tr>
<td>Commercial</td>
<td>&lt;24 Hours (pick up &amp; delivery by 4LEAF staff)</td>
<td>&lt;10 Days</td>
<td>&lt;5 Days</td>
<td>Negotiable per project</td>
</tr>
<tr>
<td>Large Commercial &gt;15,000 Sq. Ft.</td>
<td>&lt;24 Hours (pick up &amp; delivery by 4LEAF staff)</td>
<td>Negotiable</td>
<td>Negotiable</td>
<td>Negotiable per project</td>
</tr>
</tbody>
</table>

Larger complex plan reviews can be negotiated to achieve the best possible pricing. 4LEAF has a proven track record of working with municipalities to provide expedited reviews with special discounted pricing when applicable.

Pick-up of all plans will be performed by 4LEAF staff within 24 hours of the City’s phone call or e-mail. 4LEAF prefers to pick-up and deliver the plans in person in order to communicate any information that may be pertinent to the project and maintain a consistent communication. 4LEAF staff will transport the plans to and from the City upon a phone call to the 4LEAF office or a simply e-mail for “pick-up” to pickup@4leafinc.com. Pick-ups are at no additional cost.

Document Control and Electronic Plan Review

When plans and documents are received for review, 4LEAF’s Plan Review Manager and Document Control Technician analyzes the project, creates a job number, and completes a Job Setup Sheet. This form highlights both jurisdiction and project specific design criteria and notes applicable contact information. Jobs are transmitted through 4LEAF’s easily accessed EZPlan Review portal which tracks initial and subsequent reviews and is open for view by the customer. The City and their customers can view 4LEAF’s plan control log through EZPlan Review Portal.

Plans then get distributed for review to a 4LEAF team consisting of a Plan Review Engineer or Architect (a licensed state professional) and/or an ICC Certified Plans Examiner, as applicable. Our staff then performs his or her function of analyzing the plans and documentation for effective conformance to the California Codes, referenced construction standards, and City amendments. Code review methodology entails “The Effective Use
of the CBC® reinforced through proprietary and jurisdictional checklists. When complete the Plan Review Manager overviews the project for quality control purposes and forwards comments or approvals to the pre-designated contacts.

4LEAF’s EZPlan Review

- Structural & Non-Structural Guidelines and Checklists
- Specialized Spreadsheet
  - Web-Based
  - (EZPlan Review)

Electronic Plan Review

4LEAF is a green company and has the capability to receive and review electronic plans (pdf format) utilizing both Adobe Acrobat Pro and Bluebeam.

4LEAF has successfully implemented and used Blue Beam for electronic review of files to help eliminate the use of paper and take the plan review workflow to a whole new level. 4LEAF’s offices are equipped with large scale monitors for easy review of plans. Bluebeam Revu combines powerful PDF editing, markup and collaboration technology with reliable file creation.

Structural Only Review

Upon request, 4LEAF will perform “structural only” reviews for the City. 4LEAF can communicate directly with the designers via email, in-person meetings, and through our EZ Plan Review system. 4LEAF prefers PDF files for “structural only” reviews which allow several different Structural Engineers to review plans together should there be design related questions. The majority of 4LEAF’s plan review engineers have a design background and work well with project designers.

Certified Access Specialist (CASp)

4LEAF has seven Certified Access Specialists on staff. We have performed CASp inspection and plan review projects and have consulted on numerous construction projects for accessibility questions and advice.
Inspection Services

4LEAF maintains the largest database of qualified inspectors of varied qualifications. Inspectors vary from current full-time inspection staff, idle staff (temporarily between assignments), and pre-qualified staff which include inspectors who are available subject to client demand. 4LEAF’s inspectors are all ICC Certified and experienced working within a municipal work environment. 4LEAF will provide inspectors with all the necessary tools, equipment, and current code books sufficient to facilitate all required inspections. 4LEAF can provide interim or full-time inspectors same-day or within one business day.

We maintain an on-call database for as-needed requests with our clients. 4LEAF utilizes this service for more than 75 municipalities. Below is a snapshot of our database.

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### Monthly Inspection Assignment Schedule

#### Periodic Inspection Services ➔ Available Next Day

4LEAF can fulfill inspection requests immediately upon request including same day. 4LEAF has a wealth of local and available inspectors ready to serve the City of Stockton. In addition, 4LEAF has a proven track record of providing such services to a number of different building departments.

#### Part-Time Inspection Services ➔ Available Next Day

4LEAF will provide the City with part-time inspectors upon request. 4LEAF can provide part-time staff within 24 hours of request for any duration of time. 4LEAF’s Project Manager will work closely with the department to identify the right personnel and determine the appropriate work schedule.

#### Full-Time Inspection Services ➔ Available Two Days or Less

4LEAF can provide full-time inspectors upon request. 4LEAF provides this service regularly to many clients throughout the Central Coast, Sacramento Valley, Peninsula/South Bay, East Bay, and Central Valley.

#### Project Specific Inspection Services ➔ Available Two Days or Less

4LEAF is often tasked with providing inspection services to large projects on behalf of municipalities. 4LEAF currently handles large-scale projects for such clients as the City of Palo Alto, City of Cupertino, etc. These projects are developed funded into a separate City account which is distributed to 4LEAF using a separate invoice and contract number. This is particularly helpful to fast paced projects looking for continuous inspection services over a short period of time (i.e. 6 – 36 Months).
Building Department Staff Services

4LEAF has a proven track record of providing Building Officials and Permit Technician/Counter staff to jurisdictions throughout California. The 4LEAF pool of talented professionals includes qualified and experienced permit technicians, capable of providing all permit processing and counter services. 4LEAF can deploy such staff on short notice and offers training programs for department staff, if required.

Our staff encompasses the right combination of experience, education and certifications. 4LEAF Permit Technician staff must be experienced and dedicated to serving the public at the Planning and Building Department counter. Typical duties include:

- Accepting Plans for Plan Check
- Verification that Plans are accurate and complete
- Calculate Permit Fees
- Explain ordinances and procedures to owners, contractors, developers, architects, and general public
- Assist with preparation of permit applications
- Receive Plans for Planning and Building permits and route to various agencies (if requested)
- Accept complaints on code violations, process, and record complaints
- Answer telephone for field and office staff
- Process inspection requests
- Maintain files for building permits
- Operate Building Department’s computerized information system
- Input variety of information including building permits and inspections
- Complete related duties and responsibilities as assigned by Building Official and Senior staff members

4LEAF has numerous Building Official and Permit/Counter Technicians on staff, many whom are currently assigned to Building Departments throughout the state. All staff will have the materials, resources, tools, and training required to perform the job.

Building Department Services Placement Schedule

<table>
<thead>
<tr>
<th>Building Department Staff</th>
<th>Interim</th>
<th>Full-Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit Technician (ICC Certified)</td>
<td>Less Than 2 Days</td>
<td>Less Than 5 Days</td>
</tr>
<tr>
<td>Assistant Permit Technician/ Counter Staff</td>
<td>Less Than 2 Days</td>
<td>Less Than 5 Days</td>
</tr>
<tr>
<td>Building Official</td>
<td>Less Than 2 Days</td>
<td>Less Than 15 Days</td>
</tr>
</tbody>
</table>

Public Works Inspection

In addition to building inspection, 4LEAF has an experienced staff that provides public works inspection. Our team has supported numerous projects for on-call construction management and inspection services contracts for clients such as Sacramento Regional Transit District, California State Parks, and numerous municipalities. Our many public works projects include light rail extension projects, water/sewer systems, roadways, and bridges. Our team of qualified public works inspectors is available to the City of Stockton should you have needs in this area.
Section 5: Insurance Requirements

4LEAF meets or exceeds the insurance requirements provided in the Request for Proposal. A summary of 4LEAF’s Insurance policy is detailed below. The Producer of the Certificate of Insurance is Granite Professional Insurance Brokerage Inc. We have provided our current insurance certificate for the City of Stockton on the following page.

Our insurance includes:

- **Worker’s Compensation** - $1,000,000
- **Employer’s Liability** - $2,000,000
- **Commercial General Liability** - $2,000,000
Resolution No. 2017-06-20-1103

STOCKTON CITY COUNCIL

RESOLUTION AUTHORIZING THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

Development is cyclical, and during an improving economy the demand for building plan review and inspection services can outpace staffing levels; and

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods; and

On March 29, 2017, a Request For Qualifications (RFQ) for development related Building Plan Check, Inspection and Engineering on-call services was posted to the City’s Bid Flash web page in order to develop a pool of qualified firms (PUR 17-001); and

RFQs were reviewed by an evaluation panel consisting of three CDD staff and selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service and total hourly cost rate to the City; and

Four out of the five firms were recommended for the pool as follows: 4LEAF, Inc. Fair Oaks, CA; CSG Consultants, Inc., Sacramento, CA; Bureau Veritas North America, Inc., Sacramento, CA; and West Coast Code Consultants, Inc., San Ramon, CA; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. The “Professional Services Master Agreement,” attached hereto as Exhibit 2 and incorporated by this reference, between the City of Stockton and each of the following firms is hereby authorized and approved for the establishment of a Vendor Pool:

a. 4LEAF, Inc. Fair Oaks, CA
b. CSG Consultants, Inc., Sacramento, CA
c. Bureau Veritas North America, Inc., Sacramento, CA
d. West Coast Code Consultants, Inc., San Ramon, CA

Firm qualifications, staffing plans, and standard hourly rates schedules are found in Exhibit 1, which is also attached and incorporated by this reference.
2. The City Manager is hereby authorized and directed to execute the Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.

3. The City Manager is hereby authorized to enter into amendments to the Professional Services Master Agreement with each of the firms in the vendor pool in a total amount not to exceed $480,000 across all vendors.

4. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED __________ June 20, 2017 ______.

ATTEST:

MICHAEL D. TUBBS
Mayor of the City of Stockton

BONNIE PAIGE
City Clerk of the City of Stockton
AUTHORIZE THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

RECOMMENDATION

It is recommended that the City Council adopt a resolution to authorize the City Manager to:

1. execute a Professional Services Master Agreement with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. execute amendments to the Professional Services Master Agreement for individual projects in an amount not to exceed $480,000 across the entire vendor pool; and

3. authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the resolution.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. The Community Development Department (CDD) is completing multi-year forecasts and staffing to the lowest estimated need in the upcoming years. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as specialized staff availability for unique or very complicated projects.

Therefore, staff recommends Council adopt a resolution to authorize the City Manager to execute a Professional Services Master Agreement with four professional firms as detailed above for an initial three-year term with an option to extend the agreement for
up to two additional one-year periods. Costs associated with the Professional Services Master Agreement are covered by fees collected from each project applicant before plan reviews or inspections are conducted. Compensation under the proposed agreement is limited to a cumulative amount of $480,000 for all vendors.

DISCUSSION

Background

As part of the current fiscal year budget development and adoption, a combination of modest staffing increases and use of consulting services was determined to be the most responsible way to address increasing development activity and increased demand for Building Division activities such as plan check (building, engineering, and backup fire plan check), inspection, counter staffing and flood plain management. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring permanent specialist staff.

There has been a rapid increase in development project valuation in the City of Stockton over the last several years as the market continued an upward trend that resulted in increased planning and building permit activity and economic growth. Below, by fiscal year, are building permit valuations for recent fiscal years:

- FY 2012-13: $121 million
- FY 2013-14: $141 million
- FY 2014-15: $215 million
- FY 2015-16: $315 million
- FY 2016-17: $275 million (Projected)

Permit valuation has largely increased due to the volume, type, and complexity of projects as the economy improves. Although projected valuation for FY 2016-17 is expected to dip from that of FY 2015-16, valuations remain robust. Therefore, the CDD plans to continue to utilize consultants to provide the necessary flexibility to respond to cyclical demand, assist when full-time staff shortages occur, and provide specialized knowledge or training when required.

This affords the department the ability to quickly change the scale and scope of staffing support levels to correspond to workload needs at any time while maintaining high levels of customer service. Fees are collected from the applicant before any plan review, or inspection services are performed. Maintaining a pool of multiple firms provides the department the flexibility to select the appropriate consultant based on the specific project-related work and the availability of staff.

The CDD currently maintains two contracts for on-call services (building inspectors and plan checkers, permit technicians, licensed engineers, and certified building officials). Under the existing contracts 4LEAF invoices to date are $281,688.23 and CSG invoices
to date are $260,858.13 (69% expended). Each firm was used based on ability to provide qualified, experienced staff at the time of the City's request. These contracts were originally approved in Fiscal Year (FY) 2015-16 for two years and expire on June 30, 2017. Due to an improving economy and the tightening of the labor pool in specialized building services, having a Professional Services Master Agreement with four consultants will allow the City to provide a better spectrum of services and enable the department to respond to short-term increases in building activity, staff vacancies, and adhere to established timelines, policies, and legal requirements.

Present Situation

On March 29, 2017, a Request For Qualifications (RFQ) was posted to the City's Bid Flash web page. Five RFQ submittals were received on April 20, 2017, from the following vendors:

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- EsGil Corporation, a SAFEbuilt Company, Loveland, CO
- West Coast Code Consultants, Inc., San Ramon, CA

An evaluation panel consisting of three CDD staff reviewed the submissions and recommended four out of the five. The selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service, and the total hourly rate cost to the City. The pool of consultants will provide additional coverage for City service demands, and to allow a larger pool of selected consultants the opportunity to complete City work.

The Professional Services Master Agreement will apply to all four firms for services over a three (3) year period, on an as-needed basis, with the total aggregate compensation paid to all four firms not to exceed $480,000 (Exhibit 2 to the Resolution - Professional Services Master Agreement). Each selected firm's statement of qualifications, proposed staffing, and standard rate schedule for services, are included in Exhibit 1 to the Resolution.

Once the Master Agreement is in place, firms can be selected from the pool to perform work specific to each project. Project specific scope of work and fees for professional services will be submitted from the selected firms. Final scope of work and fees will be adopted via an amendment to the Professional Services Master Agreement on a project-by-project basis.

This level of contract capacity will allow the department to adjust resources as necessary to provide high quality, timely work. The CDD continues to implement process improvements while monitoring workload and demand to ensure that full-time and contract staffing levels are appropriately balanced, re-evaluating these needs
annually. Authorizing the City Manager to execute the Professional Services Master Agreement, and establish the pool will allow the CDD to continue to meet service delivery goals in an efficient, timely, and professional manner.

FINANCIAL SUMMARY

Funding for the Professional Services Master Agreement is included in the proposed FY 2017-18 budget for $320,000. The remaining portion of $160,000 is expected to be appropriated in the FY 2018-19 fiscal year budget and funded from the same account.

FY 2017-18: 048-1830-530.20-66 $320,000
FY 2018-19: 048-1830-530.20-66 $160,000
TOTAL $480,000
Insurance Requirements for Professional Services

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

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

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

2. Automobile Liability: Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than $1,000,000 per accident for bodily injury and property damage.

3. Workers’ Compensation insurance as required by the State of California, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than $1,000,000 per accident for bodily injury or disease. (Not required if consultant provides written verification it has no employees)

4. Professional Liability (Errors and Omissions) Insurance appropriate to the Consultant’s profession, with limit no less than $2,000,000 per occurrence or claim, $2,000,000 aggregate. (If Claims-made, see below.)

If the Consultant maintains higher limits than the minimums shown above, the City of Stockton requires and shall be entitled to coverage for the higher limits maintained by the consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City of Stockton.

Other Insurance Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status
The City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers are to be covered as additional insureds on the CGL policy and AL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant’s insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).

Primary Coverage
For any claims related to this contract, the Consultant’s insurance coverage shall be endorsed as primary insurance as respects the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers. Any insurance or self-insurance maintained by the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers shall be excess of the Consultant’s insurance and shall not contribute with it. The City of Stockton does not accept endorsements limiting the Consultant’s insurance coverage to the sole negligence of the Named Insured.

Notice of Cancellation
Each insurance policy required above shall state that coverage shall not be canceled, except with notice to the City of Stockton.

Waiver of Subrogation
Consultant hereby grants to City of Stockton a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City of Stockton by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City of Stockton has received a waiver of subrogation endorsement from the insurer.

Deductibles and Self-Insured Retentions
Any deductibles or self-insured retentions must be declared to and approved by the City of Stockton Risk Services. The City of Stockton may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

Acceptability of Insurers
Insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A:\:VII if admitted to do business in the State of California; if not admitted to do business in the State of California, insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A+:X.
Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

2. If Claims Made policy form is used, a three (3) year discovery and reporting tail period of coverage is required after completion of work.

Verification of Coverage
Consultant shall furnish the City of Stockton with original certificates and amendatory endorsements required by this clause. All certificates and endorsements are to be received and approved by the City of Stockton Risk Services before work commences. Failure to obtain the required documents prior to the work beginning shall not waive the Consultant’s obligation to provide them. The City of Stockton reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time, for any reason or no reason.

Consultant shall, prior to the commencement of work under this Agreement, provide the City of Stockton with a copy of its Declarations Page and Endorsement Page for each of the required policies.

Certificate Holder Address
Proper address for mailing certificates, endorsements and notices shall be:

- City of Stockton
- Attention: Risk Services
- 425 N El Dorado Street
- Stockton, CA 95202

City of Stockton Risk Services Phone: 209-937-5037
City of Stockton Risk Services Fax: 209-937-8558

Maintenance of Insurance
If at any time during the life of the Contract or any extension, the Consultant fails to maintain the required insurance in full force and effect, all work under the Contract shall be discontinued immediately. Any failure to maintain the required insurance shall be sufficient cause for the CITY to terminate this Contract.

Subcontractors
Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City of Stockton is an additional insured on insurance required from subcontractors.
Special Risks or Circumstances
City of Stockton reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.
MEMORANDUM

June 26, 2017

TO: Kurt O. Wilson, City Manager

FROM: David Kwong, Director

SUBJECT: PROFESSIONAL SERVICES MASTER TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES

On June 20, 2017 the above item was approved by City Council by resolution number 17-06-20-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document(s).

DAVID KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DK:mm
Attachments
CONTRACT ROUTING FORM

**ATTACHMENT A**

**CONTRACT TYPE** (select one)
- Original
- Amendment/Renewal/Change Order
- Grant
- Subdivision Agreement
- Other

**CONTRACT INFORMATION**
- Contract Amount: $480,000
- Contract Title: Professional Services Master Agreement to establish vendor pool for on-call Building Plan Check, et al.
- Vendor/Other Party: 4LEAF, Bureau Veritas, CSG Consultants, West Coast Code Consultants (WC3)
- Contract Start Date: July 10, 2017
- Contract End Date: June 30, 2020
- Contract Term: 3-Yrs (2) 1-year ext.

**COUNCIL APPROVAL REQUIRED?**
- Yes
- No (provide account # if no)

Council approval required for contracts over $75,000 for FISCAL YEAR: 2017-18
Motion/Resolution/Ordinance No: 17-16-29-1103
 Must be Attached

**REQUIRED DOCUMENTS** (The following documents shall be submitted with the signed contract when required):
- Business License Required? Yes
- No Business License No: 4LEAF 18 00078218 BV 18 00127671
- Bonds Required? Yes
- No CSG 18 00114727 WC3 18 00127495
- Insurance Required? Yes
- No
- Notary Required? Yes
- No Recordation Required? Yes
- No

**Routing Order**

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<thead>
<tr>
<th>DEPARTMENT</th>
<th>HEAD APPROVAL</th>
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<tbody>
<tr>
<td>DEPARTMENT</td>
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<tr>
<td>Project Mgr.</td>
<td>Mark Martin</td>
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<tr>
<td>ext.</td>
<td>8544</td>
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<tr>
<td>Staff.</td>
<td>Jobi Adams</td>
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<td>ext.</td>
<td>8564</td>
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<td>Raaann Cynenas</td>
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<td>date</td>
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<tr>
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<tr>
<th>CITY MANAGER</th>
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<tr>
<td>Signed by City Manager on: 7/19/17</td>
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<tr>
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<th>CITY CLERK</th>
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<tr>
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<tr>
<td>Retained (1) original(s) for City's file. Hard Copy on file? Yes ☐ No ☐</td>
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<tr>
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<tbody>
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<td>Original sent to vendor on:</td>
</tr>
<tr>
<td>Copy of contract to be retained by department. Original on file in the Clerk’s office.</td>
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<tr>
<td>Copy of contract sent to Purchasing on:</td>
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<table>
<thead>
<tr>
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</table>
PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AGREEMENT is entered into this 17 day of July 2017, between the CITY OF STOCKTON, a municipal corporation ("City"), and 4LEAF, Inc. a California "C" Corporation whose address is 8896 N. Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Veritas North America, Inc. a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-4200, ("Consultant"), and CSG Consultants, Inc. a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc. a California "S" Corporation whose address is 2400 Camino Ramon Ste. 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant")

RECITALS

A. Consultant is qualified and experienced in providing on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management for the purposes specified in this Agreement.

B. City finds it necessary and advisable to use the services of the Consultant for the purposes provided in this Agreement.

NOW THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:

1. Consultant’s Services. Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). Consultant shall provide said services at that time, place and in the manner specified in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

2. City Assistance, Facilities, Equipment and Clerical Support. Except as set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), Consultant shall, at its sole cost and expense, furnish all facilities and equipment that may be required for furnishing services pursuant to this Agreement. City shall furnish to Consultant only the facilities and equipment listed in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), according to the terms and conditions set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).
3. **Term.** Consultant shall perform the scope of work as described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), which is attached to this Contract and incorporated by this reference. This Agreement shall commence on the date written above and shall expire on June 30, 2020, with option for up to two one-year extensions with a 3% annual increase; provided, however the parties may agree to change either the commencement or expiration date.

4. **Compensation.** City shall pay Consultant for services rendered pursuant to this Agreement not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Compensation for services and reimbursable expenses shall be paid in an amount not to exceed Four Hundred Eighty Thousand Dollars ($480,000.00) total across all consultants. CONSULTANT acknowledges that this amount includes total compensation across four contracts.

   a. Invoices submitted by Consultant to City must contain a brief description of work performed, time used and City reference number. Payment shall be made within thirty (30) days of receipt of Consultant’s invoice and approved by City.

   b. Upon completion of work and acceptance by City, Consultant shall have sixty (60) days in which to submit final invoicing for payment. An extension may be granted by City upon receiving a written request thirty (30) days in advance of said time limitation. The City shall have no obligation or liability to pay any invoice for work performed which the Consultant fails or neglects to submit within sixty (60) days, or any extension thereof granted by the City, after the work is accepted by the City.

5. **Sufficiency of Consultant’s Work.** All reports, drawings, designs, plan review comments and work product of Consultant shall be adequate and sufficient to meet the purposes for which they are prepared.

6. **Ownership of Work.** All reports, drawings, designs, plan review comments, work product, and all other documents completed or partially completed by Consultant in the performance of this Agreement shall become the property of the City. Any and all copyrightable subject matter in all materials is hereby assigned to the City and the Consultant agrees to execute any additional documents that may be necessary to evidence such assignment. All materials shall be delivered to the City upon completion or termination of the work under this Agreement. If any materials are lost, damaged or destroyed before final delivery to the City, the Consultant shall replace them at its own expense. Consultant shall keep materials confidential. Materials shall not be used for purposes other than performance of services under this Agreement and
shall not be disclosed to anyone not connected with these services, unless the City provides prior written consent.

7. **Changes.** City may request changes in the scope of services to be provided by Consultant. Any changes and related fees shall be mutually agreed upon between the parties and subject to a written amendment to this Agreement.

8. **Consultant's Status.** In performing the obligations set forth in this Agreement, Consultant shall have the status of an independent contractor and Consultant shall not be considered to be an employee of the City for any purpose. All persons working for or under the direction of Consultant are its agents and employees and are not agents or employees of City.

9. **Termination for Convenience of City.** The City may terminate this Agreement at any time by mailing a notice in writing to Consultant. The Agreement shall then be deemed terminated and no further work shall be performed by Consultant. If the Agreement is so terminated, the Consultant shall be paid for that percentage of the work actually completed at the time the notice of termination is received.

10. **Non-Assignability.** The Consultant shall not assign, sublet, or transfer this Agreement or any interest or obligation in the Agreement without the prior written consent of the City, and then only upon such terms and conditions as City may set forth in writing. Consultant shall be solely responsible for reimbursing subcontractors.

11. **Indemnity and Hold Harmless.** Consultant shall defend, indemnify, and hold harmless, the City and its officers, agents and employees from and against all claims, losses, damage, injury, and liability for damages arising from, or alleged to have arisen from, errors, omissions, negligent or wrongful acts of the Consultant in the performance of its services under this Agreement, regardless of whether the City has reviewed or approved the work or services which has given rise to the claim, loss, damage, injury or liability for damages. This indemnification shall extend for a reasonable period of time after completion of the project as well as during the period of actual performance of services under this Agreement. The City's acceptance of the insurance certificates required under this Agreement does not relieve the Consultant from its obligation under this paragraph.

12. **Insurance.** During the term of this Agreement, Consultant shall maintain in full force and effect at its own cost and expense the insurance coverage as set forth in Exhibit E – Insurance Requirements for Provisions, and shall otherwise comply with the other provisions of Exhibit E.

13. **Notices.** All notices herein required shall be in writing and shall be sent by certified or registered mail, postage prepaid, addressed as follows:

COS and 4Leaf, Inc. Professional Services Master Agreement
Consultant: 4LEAF, Inc.
Kevin J. Duggan
8896 North Winding Way
Fair Oaks, CA 95628

City: City Manager
City of Stockton
425 N. El Dorado Street
Stockton, CA 95202

Bureau Veritas North America
Craig Baptista
180 Promenade Ci, Ste. 150
Sacramento, CA 95834

CSG Consultants, Inc.
Cyrus Kianpour
1022 G Street
Sacramento, CA 95814

West Coast Code Consultants, Inc.
Giyan Senaratne
2400 Camino Ramon Ste. 240
San Ramon, CA 94583

14. **Conformance to Applicable Laws.** Consultant shall comply with all applicable Federal, State, and Municipal laws, rules, and ordinances. Consultant shall not discriminate in the employment of persons or in the provision of services under this Agreement on the basis of any legally protected classification, including race, color, national origin, ancestry, sex or religion of such person.

15. **Licenses, Certifications and Permits.** Prior to the City's execution of this Agreement and prior to the Consultant's engaging in any operation or activity set forth in this Agreement, Consultant shall obtain a City of Stockton business license, which must be kept in effect during the term of this Agreement. Consultant covenants that it has obtained all certificates, licenses, permits and the like required to perform the services under this Agreement.

16. **Records and Audits.** Consultant shall maintain all records regarding this Agreement and the services performed for a period of three years from the date that final payment is made. At any time during normal business hours, the records shall be made available to the City to inspect and audit.

17. **Confidentiality.** Consultant shall exercise reasonable precautions to prevent the unauthorized disclosure and use of City reports, information or conclusions.

18. **Conflicts of Interest.** Consultant covenants that other than this Agreement, Consultant has no financial interest with any official, employee or other representative of the City. Consultant and its principals do not have any financial interest in real property, sources of income or investment that would be affected in any...
manner of degree by the performance of Consultant’s services under this Agreement. If such an interest arises, Consultant will immediately notify the City.

19. **Waiver.** In the event either City or Consultant at any time waive any breach of this Agreement by the other, such waiver shall not constitute a waiver of any other or succeeding breach of this Agreement, whether of the same or of any other covenant, condition or obligation.

20. **Governing Law.** California law shall govern any legal action pursuant to this Agreement with venue for all claims in the Superior Court of the County of San Joaquin, Stockton Branch or, where applicable, in the federal District Court of California, Northern District, Sacramento Division.

21. **No Personal Liability.** No official or employee of City shall be personally liable to Consultant in the event of any default or breach by the City or for any amount due Consultant.

22. **Exhibits.** All exhibits referred to herein are attached hereto and are by this reference incorporated herein.

23. **Scope of Agreement.** This writing constitutes the entire Agreement between the parties. Any modification to the Agreement shall be in writing and signed by both parties.
THIS AGREEMENT executed the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC

GENE BARRY - VICE PRESIDENT

KEVIN J. DUGGAN
PRESIDENT

CSG CONSULTANTS, INC.

CYRUS KIANPOUR
PRESIDENT

APPROVED AS TO FORM:

Taryn N. Jones
Deputy City Attorney

BUREAU VERITAS NORTH AMERICA, INC.

CRAIG BAPTISTA
PRESIDENT

WEST COAST CODE CONSULTANTS, INC.

GLEYAN SENARATNE
PRESIDENT

ATTEST:

BONNIE PAIGE
CITY CLERK

[If Consultant is a corporation signature(s) must comply with Corporations Code §313.]
Statement of Qualifications
for
On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management Services

City of Stockton

Bureau Veritas North America, Inc.
180 Promenade Circle, Suite 150
Sacramento, CA 95834
T. 916.725.4200 / F. 916.725.8242
www.us.bureauveritas.com/ccc
Craig Baptista | Director of Operations

Craig served as Director of Operations and is a business professional experienced in leading multiple branch offices in various states. Craig has over 15 years of experience in the construction industry. He is results-oriented and has exceptional experience building and managing successful programs and relationships. He is a skilled communicator capable of articulating complex ideas in a concise and persuasive manner. Craig has proven experience as a facilitator of solutions for client problems and is a strategic thinker with the ability to translate vision into tactics. He is self-motivated, passionate and resourceful. Craig has expertise identifying client needs and is able to execute problems quickly by utilizing his professional business management skills. He is equally effective working independently or collaborating with others. Craig has managed various projects as Director of Operations and successfully reduced operating expenses by 18% through implementation of a preventative maintenance program and establishment of a baseline repair cost matrix. He provided leadership, mentor direction and training for a 35 member Operations team that included Branch Managers, Project Managers, and other staff. He developed annual business plans, market strategies, operations and sales goals which resulted in year over year growth.

Select Project Experience:

Craig has worked on various significant projects, including, but not limited to:

- Apple Campus II in Cupertino, CA
- Cal Trans - Bay Bridge Project in Oakland, CA
- Tesla Gigafactory in Sparks, NV
- Souza Construction Lemoore Naval Air Station Project in Fresno, CA
- Advance Range Solution - Fort Hunter Liggett in Jolion, CA
- Hensel Phelps - Mule Creek Prison in Ione, CA

Director of Operations

Bureau Veritas North America, Inc.

Serves as Director of Operations for the West Coast code compliance division. Manages over 50 employees throughout California, Arizona, Nevada, and Washington. Oversees plan review and inspection activities to ensure BVNA has ample resources to meet turnaround times and provide quick response to inspection requests. Works directly with plan review team to gain efficiencies in turnaround times. Effectively reduced the number of reviews by promoting direct contact with designers and municipalities to remedy code deficiencies during the first and second reviews, allowing our team to approve projects during the second submittal phase.
Gene Paolini, C.B.O. | Client Liaison
Gene is an experienced building inspector and building official with over 30 years of experience. He has extensive experience in providing technical support to a variety of construction projects including commercial and residential structures. Gene has provided technical support in rebuilding a 500,000 square feet shopping mall after a major fire accident in 2010 by setting up a remote building department and helped the mall reopen within a week after the accident.

Gene has been a CTI (California Training Institute) Director for the past 10 years and served as chairperson for 4 years. He is also an instructor for CALBO and developed part of the BOLA curriculum including building department administration and budgeting and finance for building officials. He has also developed an introductory class, Building Department 101, for SVABO and CALBO.

Gene's significant achievements include:
- Obtained IAS Accreditation for the City of Roseville and making the Building Inspection Division the first California municipality to become nationally accredited.
- Conducted presentations to 22 International Code Council (ICC) chapters in California for CALBO.
- Participated in the code hearings at the Building Standards Commission for adoption of International Building Code in California.
- Implemented CALBO educational program of 425 classes throughout the state to ensure members would have a thorough understanding of the new International Code.
- Served as CALBO President from 2007 to 2008 and a Legislative Committee Member from 2006 to 2010.
- Served as SVABO President in 2000 and planned the ICBO annual business meeting as a committee chairperson.

Select Project Experience:

Chief Building Official
City of Roseville 1995 - 2016
Provided building official and technical backup support to the Building Inspection Division of the City of Roseville. Responsible for adopting and implementing new building codes for the City of Roseville tri-annually. Balanced and managed the annual building division budget ranging from $2 million to $7 million. Oversaw construction permitting, plan review and inspection of $500 million dollars annually. Analyzed costs of operations against incoming funds and recommended budget adjustments. Implemented new procedures to streamline permit application process. Managed reconstruction of 260 stores in the mall in less than 10 months.
2. Firm Information & Qualifications
FIRM INFORMATION & QUALIFICATIONS

Bureau Veritas has been in business for over 180 years. Founded in 1828 Bureau Veritas North America Inc. is a global leader in quality assurance, health, safety and environmental (QHSE) solutions. Recognized and accredited by the largest national and international organizations, and with over 70,000 employees, Bureau Veritas has unparalleled expertise and resources to manage projects requiring a broad range of expertise, across vast geographies. With operations in 140 countries and all continents, Bureau Veritas draws on the synergies between its local teams and dedicated technical centers throughout the world. Our local presence allows Bureau Veritas to provide timely delivery and exceptional customer service in the most cost-effective manner. With more than 1,330 offices and laboratories, Bureau Veritas draws on the synergies between its local teams and dedicated technical centers throughout the world. We are the top independent environmental consulting firm in the United States and the largest elevator inspection firm in the United States.

Our professionals have extensive experience in land development, floodplain, commercial/industrial, residential/multi-family, institutional, and other projects of all sizes and complexities. BVNA has extensively demonstrated our expertise through the completion of projects of various complexities and consistently applies innovative time and cost-saving technical solutions to meet each client’s specific challenges.

Firm Size
With over 70,000 employees worldwide, including nearly 4,000 employees in North America, Bureau Veritas has a strong legacy of facility condition assessment expertise throughout the United States and internationally.

Firm Type
Bureau Veritas is an international corporation with global expertise and resources. Regionally located offices allow us to respond to local client needs and expectations. Bureau Veritas North America, Inc. (BVNA) is a publicly owned and traded firm incorporated in the State of Delaware, a subsidiary of our parent company, Bureau Veritas.

Firm Background
For over 180 years Bureau Veritas has been providing clients with the tools and expertise to minimize risk and move forward with confidence. Our highly-skilled experts provide dependable, accurate reviews and inspections, develop best-practice maintenance policies and procedures. Through our inclusive network, we assist our clients in managing all aspects of their construction projects.

Firm Locations
BVNA has nearly 100 offices in the United States. In California we possess nearly 300 employees. The work on this project shall be performed from regional headquarters (principal office) located at 180 Promenade Circle, Suite 150, Sacramento, CA 95834. In California, BVNA has 7 offices with 4 of those offices housing qualified and experienced engineers and inspectors. Those offices are located at:

- 180 Promenade Circle, Suite 150, Sacramento, CA 95834
- 1655 Scenic Avenue, Suite 200, Costa Mesa, CA 92626
- 10620 Trena Street, Suite 170, San Diego, CA 92131
- 2430 Camino Ramon, Suite 122, San Ramon, CA 94553
Public Sector
BVNA is a global leader in serving the public sector. BVNA has been providing plan review and inspection services in California for over 38+ years.

Financial Stability
Over the last five years, Bureau Veritas has demonstrated proven resilience to the effects of economic cycles. The Group continues to post positive organic growth while improving its operating margin thanks to its diversified and balanced business portfolio. See section “3. Financial Statement” for financial documentation.

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<tbody>
<tr>
<td>Revenue</td>
<td>4,600</td>
<td>4,431</td>
<td>4,178</td>
<td>4,145</td>
<td>3,568</td>
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</table>

Corporate Organizational Chart

- **Finance**
  - Whitney Bergfeld
    - Division Financial Controller
  - Mike Stahmer
    - Financial Controller
  - Patricia Kivett
    - Project Accountant
  - Germaina Bueno
    - Project Accountant
  - Kathy Litton
    - Project Accountant

- **Isam Hasenin, P.E., C.B.O.**
  - Chief Operating Officer (COO)

- **Human Resources**
  - Kevin Dworaczyk
    - Director of Human Resources
  - Elizabeth Tucker
    - Corporate Recruiter

- **Operations**
  - Craig Baptista
    - Director of Operations [Principal In-Charge]

- **Business Development**
  - Gene Paolini, C.B.O.
    - Client Liaison
What Sets Us Apart
Our ability to offer a variety of services and to customize services for each community makes BVNA an ideal partner. We are ideally suited to provide plan review, inspection, engineering plan review, and floodplain management services to the City of Stockton because we possess:

Unparalleled Building Safety and Code Consulting Expertise
- Proven Track Record Nationally (400+ Agencies)
- Building and Safety Consulting to 150+ Agencies in California
- Municipal Management and Staff Augmentation Expertise
- Key Staff that Have Helped Establish and Implement the Latest International Codes
- No private sector design work = no conflict of interest

Depth of Resources and Proximity to Meet Peak Workloads
- Plan check services will be provided from our Sacramento, CA office
- 50+ Offices Throughout the United States - 5 Offices in California
- Registered Engineers and ICC-Certified Staff Dedicated to Code Compliance
- USGBC LEED Review Certifying Body
- Largest plan review firm in the United States

Best Practices and State-of-the-Art Processes to Consistently Meet Turnaround Schedules
- First Firm to Achieve IAS Certification
- Comprehensive and Formalized Plan Check Procedure
- Award-Winning Web-Based Project Tracking and Controls
- Electronic Plan check to Save Time, Money and Paper – A GREEN solution
- High success rate meeting review turnaround schedules

Strong Municipal Focus
- Helped establish and manage departments for more than 20 newly incorporated cities
- Provided building, fire, and civil engineering department head positions for more than 50 cities

The Right People Doing the Right Job
We have extensive resources and a large pool of licensed and certified building safety experts who are equipped to handle all of our Client's needs, including Building and Fire Plan check, Building Inspection, Permit and Counter services, Code Enforcement, LEED review, ADA Compliance, and Building Officials Services. Our professionals have extensive experience in commercial, residential, industrial, energy, and institutional projects of all sizes and complexities, allowing them to tailor solutions specifically to teach client.

Bureau Veritas and our proposed, locally-based staff for this contract have a long-established history working for the nearby municipalities to perform outside plan check and field inspection services. Consequently, we can leverage a breadth of code compliance and permit processing expertise to meet the needs of the City, and offer highly qualified engineers and ICC-certified staff who are in close proximity and can quickly respond to your needs.
What Our Clients Have To Say...

"The ‘ABA for Small Business’ seminar presented by Pete Cucchiola was timely, informative and of great business interest in West Sacramento. Pete’s participation is a great example of how the Chamber and the City work together in support of our business community."

— Denis A. Stuck, President/CEO, West Sacramento Chamber of Commerce

"My role as Project Manager for Kleinfelder was enhanced by the superior service and personnel offered by Bureau Veritas.

— Ted Olen, Kleinfelder

"Our experience in West Sacramento with the Bureau Veritas provided contract services have been very positive. Their attitude is consistently helpful."

— Duane Johnson, AIA, Comstock & Johnson

The First Firm in the World to Receive IAS Accreditation

Bureau Veritas is the first company to achieve accreditation under the International Accreditation Service (IAS) Third-Party Permitting, Plan Review, and Inspection Service Providers Accreditation Program (AC 402). The IAS accreditation program was developed to verify the competence of companies that provide services for building departments.

Building departments can use the IAS program to verify that the companies they hire are qualified to provide building safety services for their jurisdictions. For Bureau Veritas, accreditation is a way to provide independent verification of our established quality procedures and best practices that have been an integral part of our company since its founding in 1828.

This achievement demonstrates that Bureau Veritas has processes in place to ensure consistency in how we perform plan checks, inspections and administrative actions. More importantly, this new accreditation reinforces our business values of customer focus, sharing collective knowledge and continuing education, corporate transparency, teamwork, and solidarity.

The International Accreditation Service (IAS) is a nonprofit, internationally recognized, accreditation body and a subsidiary of the International Code Council (ICC), www.iccsafe.org. IAS accredits building departments, third-party building department service providers, special inspection agencies, product certification agencies, inspection programs for metal building manufacturers, fabricator inspection programs, testing and calibration laboratories, inspection agencies, training agencies, curriculum developers, and field evaluation bodies. IAS is signatory to several international mutual recognition arrangements (MRAs), which

"Bureau Veritas’ achievement of the new IAS accreditation is a testament to their competence and commitment within their chosen industry."

— Vice President of Planning, Port San Antonio, TX

04/18/17 Move Forward with Confidence
OUR CAPABILITIES

BVNA has an extensive background in building services. Our range of experience in this unique arena covers literally every key area of service defining a building department in today's industry. We are skilled at helping existing building departments augment or refine their current level of client service or capable of crafting a department from the ground up.

- Permitting
- Plan Review
- Inspections
- Code Interpretation
- Code Adoption and Ordinance Preparation
- Planning and Zoning Meeting Attendance
- City Council Meeting Attendance
- Building Official Duties
- Permit Tracking and Record Keeping
- Plan Reviewer, Inspector and Permit Tech Training
- Budget and Staffing Planning
- Pre-Design and Pre-Construction Meetings
- Designer and Builder Training
- Contractor Licensing
- Fee Schedule Evaluation and Updates

Our local presence allows us to provide timely delivery and exceptional customer service in the most cost-effective manner. Our long-standing presence in Northern California and past experience working with the City of Stockton has enabled us to gain the knowledge of the local area and to provide continuity, responsiveness to on-call assignments, and technical proficiency.

BVNA will bring a cooperative and creative problem solving approach to plan review. We fully understand our role as a team member committed to achieving successful projects for the City and its customers. Our team has considerable experience providing expedited and phased reviews on complex and unique projects such as custom residential, multifamily residential, Roseville Galleria Mall Fire Damage Repair, as well as inspections of complex projects such as Claybank Adult Detention Facility, a large 1,000,000+ square foot distribution center, and several large scale solar power generation facilities.

Building Department Plan Review

BVNA personnel have performed and managed plan review for literally thousands of on-call projects. Project types include high-rise hotels and office buildings, institutional occupancies such as jails, shipping facilities, room additions, single-family tract and custom homes, tilt-up shells, tenant improvements, and infrastructure (roads, wet and dry utilities, etc.). Our staff has considerable review experience of virtually any structure requiring permits, plan reviews, and inspections. With such a large and licensed plan review staff, we are able to manage numerous and complex projects simultaneously. We are able to provide discipline-specific plan reviews (e.g., structural, mechanical/plumbing, electrical, fire, access, street, drainage, map, civil infrastructure, etc.).
We are the largest plan review firm in the United States, providing full service code consulting and plan review services. Our team provides plan reviews for compliance with a variety of codes, including the California Building, Plumbing, Electrical, Mechanical, Fuel Gas, Energy Conservation, Fire and the National Electric Codes as adopted by the City. We have specific experience working through a variety of challenges including, but not limited to, infill commercial development, adaptive reuse and change of occupancies of existing buildings, retrofit of un-reinforced masonry or soft-story buildings, large commercial shopping centers and mixed-use multi-family developments, live-work projects and high tech, research and development facilities.

We are able to offer the following plan review services to the City of Stockton:

- Architectural, fire and life safety plans examination
- Structural plans examination
- Energy code plans examination
- Accessibility requirements including:
  - Barrier free plans examination requirements
  - Disabled access
  - CASp
  - ADA
- Mechanical, plumbing and electrical code plans examination
- Review and approval of alternative materials, alternative design and methods of construction
- Fire plan review including:
  - Fire sprinkler
  - Fire alarm
  - Smoke detection and dampers
  - Underground
- Civil plans examination including:
  - Grading and drainage
  - NPDES/SWPPP
  - Development
  - Infrastructure
  - Water and wastewater
  - Sewer
- Green building and LEED consulting
  - LEED submittal consultation
  - Green building consulting including CALGreen
  - ENERGY STAR verification
  - Energy efficiency audits

Plan Review Turnaround Times
At your request, BVNA can provide plan review activities on a fast-track basis. Turnaround times for each submittal will relate to the size and nature of the project and its impact on the construction schedule. To reduce turnaround times for plan review, we can use electronic submittals, phased submittals, conference calling, and videoconferencing.

BVNA has built long-term partnerships with agencies. We understand that accuracy, efficiency, and integrity in all aspects of professional services are required.
Testimony to our professional excellence is the fact that we have provided services to many of our municipal clients since their incorporation. Because of our large pool of accessible resources we are able to assemble experienced personnel in order to help with project schedule recovery when necessary. Our team will maintain efficient turnaround times on all reviews as a key measurement of our performance for our plan review services. The following schedule is representative of the review times associated with the type of construction you can anticipate.

Typical turnaround times for building plan review are as follows:

<table>
<thead>
<tr>
<th></th>
<th>Initial Check (working days)</th>
<th>Recheck (working days)</th>
<th>Expedited Initial Review</th>
<th>Expedited Recheck</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial TI</td>
<td>10</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Residential addition and/or accessory building</td>
<td>10</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>New Residential</td>
<td>15</td>
<td>10</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>New Commercial</td>
<td>15</td>
<td>10</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Complex, large, or unique project</td>
<td>*</td>
<td>*</td>
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<td>*</td>
</tr>
</tbody>
</table>

*Turnaround times for unusually complex or large projects can be negotiated*

BVNA will also accommodate preliminary reviews to facilitate fast tracked or accelerated projects. This will aid with timely turnaround and create good public relations. If applicants include designs that do not conform to the prescriptive requirements of the codes, the City's designee will have final approval over the plan being reviewed. Our staff will make recommendations for the resolution if requested. We are also available to meet with agency staff or others as needed to discuss our findings.

Third Party Plan Review and Inspection

Bureau Veritas provides comprehensive Third Party Plan Check Services for local agencies. Since we don't do design work for the private sector, there is never a conflict of interest, and the agency is assured that our staff of certified Plan Reviewers and licensed plan review engineers is committed to enforcement of all applicable standards. We are always available to discuss the results of the review with the applicant. Bureau Veritas provides direct client interface with the applicant until all documents are complete, and then forwards them to the Jurisdiction for permit issuance.

Rapid development can be overwhelming to building departments and can cause schedule delays for developers, contractors, and design-build teams. Although public agencies are dedicated to providing a high level of customer service while ensuring the integrity of design and construction, their staff becomes overloaded and unable to keep the development moving forward efficiently.

Third party plan review and inspection enables BVNA to supplement the local authority having jurisdiction on a project-by-project basis, at the applicant's expense. This is an optional method to accomplish the plan review for applicants that desire preliminary plan reviews or have expediting needs due to project time constraints.
This method allows the designer to work with plan review staff early in the design process to avoid code problems that could lead to extensive redesign of completed plans. It also allows the permit applicant to pay for review services directly to BVNA, independent of the normal City plan review fee. With approval of the building official, our team can provide third-party plan reviews/inspections by allowing an applicant to provide payment directly to BVNA for our plan review fee or inspection costs.

This program is utilized by many public agencies, developers, contractors, and project management firms to help promote economic development, keep projects on track, expedite projects, etc. BVNA teams with cities, counties, developers, contractors, project managers, design-build teams, and other members of the development community to provide a high level of customer service, experience, and technical expertise. We have provided third party plan review and inspection services for thousands of projects.

Certified Access Specialist (CASp)
California's CASp program is designed to meet the publics need for experienced, trained, and tested individuals who can render opinions as to the compliance of buildings and sites with the State codes and regulations, and Americans with Disabilities Act (ADA) for accessibility.

BVNA's CASp team will provide complete plan review and inspection for jurisdictions and specific projects. We have CASp certified individuals who are able to respond to the needs of the City quickly. We currently provide CASp certified individuals to multiple jurisdictions in California to meet the requirements of SB 1608.

Additionally, our team includes ICC Certified accessibility plans examiners and inspectors who routinely conduct accessibility reviews on projects throughout the State including minor restroom upgrades to significant ADA compliance improvements.

LEED Consulting/Review
BVNA is at the forefront of the green building movement, and by implementing green building solutions, we help reduce energy consumption, maintenance and capital costs, environmental impact, and increase occupant comfort and health.

- Expertise assisting municipal clients in green building ordinance implementation
- Provided approximately 1,000 LEED reviews for the USGBC
- Building services
- LEED submittal consultation
- Green building consulting
- CALGreen code compliance
- ENERGY STAR verification
- Energy efficiency audits
- Chain of Custody (COC) certification

Green Building Expertise
Bureau Veritas is at the forefront of the Green Building movement, and by implementing Green Building Solutions, we help reduce energy consumption, maintenance and capital costs, environmental impact, and increase occupant comfort and health.

- Expertise in assisting municipal clients in Green Building Ordinance implementation
Provided approximately 1,000 LEED reviews for the USGBC
- Building Services
- LEED submittal consultation
- Green building consulting
- CALGreen Code Compliance
- ENERGY STAR verification
- Energy efficiency audits
- Chain of Custody (COC) Certification

Electronic Plan Reviewing
We have successfully used a digital solution to plan reviewing for over 60 federal, state, and local agencies. Electronic plan reviewing allows for collaborative net meetings, where the City's staff, developers, engineers, and our plan reviewers can coordinate and discuss review comments in real time, referring to detailed aspects of the project. Built-in software viewers allow the team members to view all of the information without having any additional software on their computers.

The following figure shows an example of our digital commenting provided with corresponding comments in numerical sequencing. Bureau Veritas will make this solution available at no cost to the City.

Digital plan checking will be a practical solution to help you avoid the need for expanding storage space, foster communication and collaboration, and reduce staff involvement for copying, shipping, and receiving plans. For one major capital plan check project we completed for the California Energy Commission we estimated shipping and printing cost savings of over $150,000 as well as a reduction of over 750 hours in plan review and permitting processing staff time.

Building Department Plan Review Methodology
Our proposed team familiarizes themselves with the requirements of a public agency before beginning a review. BVNA has extensive public sector experience, which assures that the public's interests are fully protected. We believe that technical competence, while expected, is not enough. Experience and careful, thorough consideration of issues and impacts is needed in addition to the purely technical considerations. We have devoted a great deal of time and effort over the years to refining our approach and developing documentation to assist our clients and train our staff in understanding plan review procedures.

BVNA will work to ensure that submittals are properly coordinated and tracked by following an established internal plan check coordination process in which each plan received for review is entered into our Deltek database, processed and returned on time to the client. Our plan tracking procedures are designed to track each submittal throughout the review process and maintain accurate and comprehensive records for each submittal. To accomplish this we:
- Screen and log each application to assure that they are routed to all plan reviewers in a timely manner.
- Submittals are reviewed for compliance with all relevant state and City requirements. The log serves as a tracking device to assure turnaround times and completeness of the review.
- Plan reviews will be done in accordance with local, state and federal regulations with which local jurisdictions are mandated to enforce as well as all codes and ordinances in effect by adoption at the time of plan review. Preliminary consultations will be provided to the applicant upon request, to assist and guide them in the design and plans preparation process.
• Information shown on each permit application is verified. Construction valuation is based on information provided by the City and compared to estimates provided by the applicant.
• Provide a thorough architectural and structural review of design drawings and details for compliance with the California Building Code architectural provisions, including provisions for safety glazing, building security and noise insulation performance standards, to name a few.
• Plan review management.
• BVNA assures that corrections are handled as quickly and as clearly as possible. Our goal is to help the applicant through the plan review process. All corrections are identified based on compliance with specified codes and regulations.

Generally, corrections are identified in two ways. Notes are made on plans during electronic review or on hard copy plans if appropriate and a correction sheet is generated detailing what items need to be addressed before plans can be approved. The City shall approve the development of any customized correction sheets. Correction sheets for specific projects shall be forwarded to the City along with a cover memo containing at least the following:
• The date(s) plans were received and reviewed by our firm
• The date(s) the applicant was notified of completed plan reviews
• The name and telephone number of the applicant

During the plan review process, BVNA is prepared to meet with the applicant or architect/engineer, City employees or consultants at any time. Telephone discussions or meetings at project sites are welcomed to assure that any plan review issues are handled efficiently. We propose to meet at the offices of the building and safety division or at a particular project site. Our goal is to issue approved plans as quickly as possible but in full compliance with laws, codes, ordinances and regulations. Upon completion of the plan review, the following information package is prepared and logged as a minimum:
• Completed plan review documents which include sign-offs
• Transmittal letter documenting any conditions associated with issuance of a permit, if any
• Marked up plan review documents
• Two sets of approved building plans
• Backup documents and reports

All documents shall be provided in a format desired by the City.

Transmittal of Plans and Correction Lists
BVNA assumes responsibility for the pickup and return of plans. All plans shall be picked up from the City offices within 24 hours of notification. Should the volume of work be sufficient, we propose to establish regular pick up of plans on a consistent basis. We will also utilize shipping courier, at no additional cost to the City.

Upon completion of each plan review, we will forward a copy of the correction list to both the City and the applicant, by mail. When corrected plans are resubmitted, the previous procedure will be followed or the applicant may schedule an office visit to go over any corrections in person. When plans are completed they are stamped, signed and forwarded by BVNA staff. Our transmittal forms are customized for use unique to the City.
Building Inspection
BVNA can provide inspection services for a single project that presents unique complexities due to its construction or size, or we can provide enough staff to handle all inspection services for an entire jurisdiction. Our building inspection services can be adjusted to provide a high level of coordination specifically suited to the design-build concept. Our inspectors are ICC certified and have extensive experience in the construction trades as well. Fast-track projects may be built into small phases based on incremental design and fabrication steps. In such cases, our inspection team keeps daily logs to track corrections and plan review changes.

BVNA’s inspection teams also provide on-call building inspection services to cover staff vacation time, peak work loads, specialized inspection activities, and any other situations that may arise. These activities may include next-day inspections and same-day response to important or urgent requests.

BVNA will provide the client with ICC certified personnel to provide the following services:

1. Read and study project specifications, plans, and drawings to become familiar with project prior to inspection, ensuring that structural or architectural changes have been stamped as approved by appropriate authority and recognizing the need for and requiring plan checks for electrical, plumbing, and mechanical code requirements.
2. Perform and document inspections on construction projects to determine that all aspects of the project such as foundations, building, electrical, plumbing, and mechanical systems conform to the applicable building codes, zoning ordinances, energy conservation, and disabled access requirements including known local, city, state, and federal requirements.
3. Review plans for building construction, plumbing, electrical, and mechanical details prior to making inspection.
4. Bring to the attention of the City of Stockton for approval of certain changes in building, plumbing, mechanical, electrical, and related work consistent with code and ordinance requirements.
5. Participate in reviews with fire, health, and other government agency inspectors, as well as owners.
6. Maintain a record of non-complying items and follow up to resolution of such items.
7. Upon request, we will inspect existing buildings for substandard, unsafe conditions.
ATTACHMENT A

Statement Of Qualifications for City of Stockton
PUR 17-001 | On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management

Engineering Plan Review and Floodplain Management
As a result of our extensive experience providing development review and processing services to public agencies, we have been able to evaluate those qualities which are essential to providing effective review services.

Foremost among these are the following:
- A thorough command of the City’s design standards for Drainage and Streets, and NPDES enhanced Clean Water Act requirements
- Clear, friendly, and articulate communication with the applicant

BVNA has developed a successful approach to providing development review services which we believe achieves these goals.

Engineering Plan Review Compliance Standards
As an initial step, our professional staff would familiarize themselves with all city, state, and federal requirements applicable to the project before beginning a review. Requirements for civil infrastructure originate from multiple sources including statutory requirements, local ordinances and design guidelines, federal requirements including ADA and NPDES, state requirements including Title 24, and the requirements of any affected utilities, districts, or agencies.

Civil infrastructure and site plans are reviewed for conformance to the following quality standards:
- Greenbook
- Geotechnical Report recommendations
- Conditions of Approval of the use permit or Tentative Map
- Municipal Code and local ordinances
- Jurisdiction’s design guidelines and standard plans and specifications
- ADA and Title 24 accessibility standards
- NPDES C.3 requirements when applicable
- Environmental mitigation requirements
- Requirements of affected outside agencies and utility districts

Our professional plan reviewers will provide a comprehensive assessment of the conformance of submitted improvement plans to these quality standards.

Improvement Plan Review Tasks
The following outlines our typical scope of services for the review plans:
- Check design for conformity to the approved tentative map and conditions of approval
- Evaluate the layout for consistency with the final map
- Review grading plans for consistency with the applicable drainage standards and grading ordinance
- Erosion and sediment control provisions
- Storm Water Pollution Prevention Plans and RWQCB N.O.I.
- Review horizontal and vertical alignment of streets for conformance to the applicable street design standards, check pavement structural section against geotechnical recommendations
- Review storm and sanitary sewer systems and hydrology/hydraulic calculations
- Review water distribution system for fire hydrant and valve spacing
- Street light spacing, and location for potential conflicts
Prompt turnaround of quality plan reviews is the hallmark of our service. Ideally, the review process involves no more than two plan submittals, perhaps three under extraordinary circumstances. To achieve this, it is important for the plan reviewer to see the “big picture” during the approval process, and to expedite the review, while assuring adherence to all City standards and requirements.

At the completion of each review, comments noting any deficiencies are prepared for the Applicant. Review comments may be distributed by the City staff, or directly to the Applicant by BVNA, depending on the City’s preference. Copies of review letters are always forwarded to the City for its records and files. Our customary practice is to provide comments in narrative form in a memorandum. We find this method to be more precise than just marking the submittal alone. Additionally, this method facilitates the transmission and preservation of comments in electronic format.

Development Review & Entitlement Processing
Accurate, Timely Civil Engineering Plan & Final Map Reviews
Facilitating land development projects requires a strong public-private partnership. Project momentum must be balanced with engineering, water quality, traffic, public safety, and final map plans that comply with applicable codes, requirements, and design standards. The various parties need impartial counsel from registered engineers and land surveyors and quick turnaround review comments in a seamless manner.

Development review and entitlement processing involves working seamlessly with the public agency and developer in the preliminary planning stages to facilitate development agreements along with the review of civil engineering plans and maps for conformance with conditions of approval along with local and other applicable ordinances and standards. All work is performed under the direction of a registered Civil Engineer or Land Surveyor. BVNA utilizes proven best practices, staff specialists, and comprehensive web-based tools to provide timely review, responsiveness, and accurate and detailed review comments.

Approach to Development Review & Entitlement Processing
Scope definition
BVNA will meet with the client to define their scope of services, project performance needs and expectations, turnaround review schedule, communication and work flow process protocol, and key stakeholder contacts. Setting expectations initially promotes a partnership to create a customized solution that achieves project goals.

Implementation
Our firm has formulated a Quality Control program that is used to effectively manage the development review and entitlement processing workflow. Through our CARE (Coordinator, Analyst, Reviewer, Expert) Program, our team of professionals ensures thorough, accurate, and consistent services.

Communication
Our staff utilizes a series of proven technologies to streamline service delivery, enhance communication, and promote transparency. Comprehensive, web-based project management systems that delivers secure access 24/7 to project data, generates e-mail updates, and digitizes the entire plan review, map review, and
inspection process. We also use electronic plan review, where reviews and comments are accessible in real
time via the web. These tools encourage collaboration, enhance expedited requests, save money and time,
reduce waste and storage space, build consensus, and promote project transparency.

Map Review and Land Surveying Services
Our professional staff can provide comprehensive City Surveyor services as may be required by the City:

Final Maps and Parcel Maps
Review Final Maps and Parcel Maps for conformance to the requirements of the Subdivision Map Act,
the Land Surveyors Act, the City’s Municipal Code and ordinances, the approved Tentative Map, and any
conditions of approval which have been set by the Planning Commission. Certify the technical accuracy of
approved maps in accordance with §66442 and §66450 of the Subdivision Map Act.

Reversions to Acreage
Review Reversions to Acreage Maps prepared pursuant to §66499.11 of the Subdivision Map Act.

Lot Line Adjustments and Parcel Mergers
Review of legal descriptions prepared to affect Lot Line Adjustments pursuant to §66412(d), and Parcel
Mergers pursuant to §66451.10 of the Subdivision Map Act.

Legal Descriptions and Plats
Review and/or preparation of legal descriptions and plats for right-of-way takes, easements, or for other
purposes when necessary.

Certificates of Correction
Review of proposed map amendments and Certificates of Correction prepared pursuant to §66469 of the
Subdivision Map Act.

National Pollutant Discharge Elimination System (NPDES)
In addition to implementing the National Pollutant Discharge Elimination System (NPDES) regulations,
as authorized by the Clean Water Act, our staff has worked to train agency staff in how these evolving
regulations impact their program. For example, Bureau Veritas provides comprehensive training to in-house
staff and Southern Californian agency personnel for the new Statewide General Construction Permit. As
well, we trained City of Fullerton inspection staff to perform industrial and commercial inspections to maintain
NPDES permit compliance. The training materials were custom-made to include the City and Santa Ana
RWQCB recommendations and requirements.

Through Bureau Veritas’ stormwater design and review work we have developed a complete understanding
of the NPDES regulations and permits and what is necessary to navigate through them during project
design. This expertise makes us uniquely qualified to assist you in implementing any aspect of your NPDES
program. Bureau Veritas will ensure that your work is completed without delay, with accountability, and with
the highest level of quality.

BVNA offers floodplain management, our program of corrective and preventative measures help in reducing
flood damage. These measures take a variety of forms and generally include zoning, subdivision, or building
requirements, and special-purpose floodplain ordinances.
ADDITIONAL CAPABILITIES

Building Official Services
BVNA staff will work directly with City staff to prepare accurate interpretations of the Code requirements, to adopt and process new codes and their requirements, and to act as a general point of contact for the jurisdiction. The building official will provide the support and direction necessary to facilitate timely and efficient work amongst the jurisdictional staff and other departments.

Our staff is able to analyze applicable ordinances and resolutions of jurisdictions and make recommendations for approval of appropriate code adoptions, amended as necessary in accordance with the applicable code, to implement an effective and compliant code enforcement program. Our staff will keep current on applicable code requirements adopted at the state or federal levels and inform and implement as necessary to keep the jurisdiction compliant. Our building official will attend staff, board, and council meetings as required and mutually agreed upon. This individual will oversee other BVNA staff as well as provide guidance for City staff, applicants, designers, and contractors to navigate the code. Our building official and support team will be up to date on code changes and will assist in implementing those changes.

Typical duties of the building official can include:

- Manage and oversee the building department
- Guide inspectors and plans examiners on adopted codes and local amendments
- Make recommendations regarding local amendments and code adoption
- Serve as liaison between BVNA and the City
- Serve as liaison between the building department and other City departments
- Attend meetings as requested and agreed upon
- Report building department activities as requested and agreed upon
- Assess applicant and client satisfaction
- Attend pre-submittal meetings when needed
- Assist in improving the processes and procedures of the building department, if requested

Wastewater Treatment Services
Bureau Veritas has devoted resources in the pursuit of achieving ever higher standards for quality of industrial materials, engineered products, machinery and civil structures. Testament to this devotion is illustrated in the continuous membership with the American Society for Testing and Materials (ASTM) and through its leadership of this organization where employees have served in the capacity of President. With over a century’s dedication to the exclusive pursuit of quality, there is no comparable firm in existence with more Water Transmission and Wastewater Treatment Quality Assurance experience than Bureau Veritas.

We have tailored our operating procedures and developed the professional credentials of our staff specifically to secure the highest levels of manufactured product quality. It is through this demonstrated commitment to this industry that Bureau Veritas has earned the trust of its clientele and the subsequent involvement in some of history’s largest and most technically challenging Water Transmission and Wastewater Treatment projects.
Regardless of where our services are performed, Bureau Veritas' century-old objective is to verify that the product furnished by the supplier is in full compliance with the expectations of our clientele. Our sound inspection procedures and superior staff of experienced professionals lead to an unmatched measure of quality that reduces costly construction delays and subsequent servicing and maintenance costs.

The caliber and diversity of our staff has been developed and nurtured to encompass the widest range of experience and exposure to the latest technological developments in this field. Our field staff’s qualifications range from career Quality Control Inspectors, to American Welding Society (AWS) Certified Inspectors, to Precast/Prestressed Concrete Institute (PCI) and American Concrete Institute (ACI) Certified Inspectors, to professionally licensed Engineers.

Our operations are administered by a licensed Professional Engineer, which allows us to consult and support our inspection staff should any technical problems arise on an assignment. Additionally our staff includes: Professional Geologists, Pollutant Storage Systems Specialty Contractors, Welding Engineers, Metallurgists, NDT Level III Coordinators, Plan Reviewers, Building Inspectors, General Building, Utility and Water Well Contractors, National Association of Corrosion Engineers (NACE) certified personnel, Hydrogeologists, Chemists, Mineralogists, Certified Industrial Hygienists, Asbestos Consultants, Biologists, Scientists and OSHA-Trained Environmental/Remediation Construction Technicians. The utilization of only qualified, properly trained individuals is at the crux of our corporate Quality Assurance/Quality Control Plan.

Through this commitment, Bureau Veritas has made substantial contributions to the development of standards, procedures, specifications, and test methods. Today we are one of the largest, most qualified fabrication inspection companies in operation. Bureau Veritas is recognized worldwide as an unbiased, reputable and independent source wherever judgment is sought during fabrication, construction or erection.

Health, Safety, and Environmental Services
Bureau Veritas North America, Inc. (Bureau Veritas) has been successfully providing Health, Safety, and Environmental (HSE) services to clients throughout the U.S. since 1954. We offer an exceptionally well-qualified staff of over 200 certified HSE professionals (including 47 Certified Industrial Hygienists [CIHs], 22 Certified Safety Professionals [CSPs], and 9 Certified Professional Ergonomists [CPEs]) located throughout 21 HSE offices and three laboratories nationwide.

Our list of select HSE services and areas of expertise include:

- Environmental Site Assessments (Phase I and Phase II)
- Asbestos and Lead Management
- Health and Safety Plan (HASP), Lead Compliance Plan, and Asbestos Abatement Plan Preparation
- Health Risk Assessment (HRA) and Remedial Action Plan (RAP) Preparation
- Water Damage Assessments (Mold)
- Underground Storage Tanks Close-Out Reports
- Soil Analysis Reports
- Soil Sampling Reports
- Industrial Hygiene (IH) Surveys
- Indoor Air Quality (IAQ) Surveys
- Safety Audits
Key Staff Members

The dynamics associated with administering the Client's project places a premium on providing a staff and organization that promotes flexibility, capacity, customer-orientation, continuity, and strong technical competence. Our organizational structure maximizes close communication and the accountability of our team. Our key, local management personnel are committed to providing quality service to clients for the duration of the contract.

We have included resumes highlighting the qualifications of all the staff members who will be available to provide plan review and inspection services to clients. In addition to the list of proposed staff identified, we have a deep bench of local registered engineers and ICC certified staff that specializes in plan check and inspection services. We can mobilize these individuals should other resources be needed.

Upon selection Bureau Veritas can furnish current and valid State of California driver's licenses for each individual.

Project Management Team
Our management team is dedicated to serving the City of Stockton and providing resources to ensure successful technical reviews for all disciplines. Our management team will directly oversee the review of submittal documents, bulletins and change orders to assess compliance with the regulations contained in the various building codes, and recommend action with respect to the building permit. Our Project Manager, Craig Baptista, has considerable experience managing large, phased projects for clients throughout California. He will provide project oversight, ensuring that plans and documents are reviewed timely and accurately. Craig's experience enables him to provide additional flexibility to the City with any changes or upgrades, and to help control costs, schedule, and overall progress of the project. Michael Vieira, CBO, our Special Projects Manager, has technical knowledge and extensive experience working on public sector projects throughout California. Our company representative who will be responsible for day-to-day management of this contract is Gene Paolini, C.B.O., our Client Liaison. Gene is an experienced building inspector and building official with over 30 years of experience. He has extensive experience in providing technical support to a variety of construction projects including commercial and residential structures.

Project Team Organizational Chart
Our organizational chart depicts lines of communications and areas of work for each of our team members. Each project team member has been specifically chosen for their experience in performing the required scope of work detailed in the request, as well as their extensive list of certifications and licenses. Key personnel included in this proposal are committed for the duration of the University's need. Any substitutions or changes to the team will be brought to the attention of the University and approved. Included in the following pages are resumes for key personnel. Full resumes for key staff members are available upon request.
Project Team Organizational Chart

City of Stockton

Craig Baptista
Director of Operations

Gene Pastini, C.B.O.
Client Liaison

Michael Vieira
Special Projects Manager

Andrea Colley
HR Deputy/Inspection Services Manager

CIVIL SITE STAFF

CIVIL PLAN REVIEW ENGINEERS:
William Elsby, P.E.
Mark Bowers, P.E.
John Choi, P.E., B.S. Civil Eng.
Steven Bocock, P.E.
Joe Aeger, P.E.
Michael Middletone, P.E.
Craig Krueger, P.E.
Jay Choi, P.E.
Wendy Heggans, P.E.

CIVIL PLANS EXAMINERS:
Michael Foreman, P.S.
Anthony Small
Steve McCarley

FINAL MAP STAFF

Wendy Heggans, P.E.

FINAL MAP REVIEW ENGINEERS:
William Elsby, P.E.
Mark Bowers, P.E.
Michael Middletone, P.E.

FINAL MAP PLANS EXAMINERS:
Michael Foreman, P.S.

BUILDING SAFETY STAFF

PLAN REVIEW ENGINEERS:
Ally Hs. S.T., LEED AP
Tim Schnurr, S.E.
Eric Rodriguez, S.E.
Dan Bann, P.E.
Steven Black, P.E.
George Kelley, P.E., CBC
Wendy Heggans, P.E.
Gary Wilcox, P.E.
Mac Sotiri, P.E.

PLANS EXAMINERS:
David Bowers, F.T.
Dave Bridges
Dave Lyndall
Rhonda Barringer
Charles Ennis
Don Laverne, C.A.S.
Brian Walsh, C.A.S.

INSPECTION STAFF

INSPECTORS:
Leon Michael
Joe Ebal
Dave Lyndall
Patricia O'Connor
John Bremner, C.B.D.
Brian Eider
Rhonda Barringer, C.B.D.
Michael Robinson
Charles Ennis
Bryan Moehl, C.A.S.
Danny Moore
Craig Rittermore
Chet INSPECTORS
Andrew Korning
David Basten

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<tr>
<th>Name</th>
<th>Education</th>
<th>Experience</th>
<th>Licenses / Certifications</th>
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</table>
| Craig Baptista, Director of Operations | M.B.A.  
B.S., Business Management                                 | 15+ years of experience     | Six Sigma Green Belt Certified  
OSHA 30  
United States Navy: Honorable Discharge                                                  |
| Gene Paolini, C.B.O., Technical Liaison |                                                 | 30+ years of experience     | ICC Certified:  
Certified Building Official  
Building Inspector  
Mechanical Inspector                                               |
| Michael Vieira, Special Projects Manager |                                                 | 36+ years of experience     | ICC Certified:  
Building Inspector Building Inspector  
CBC Building Plans Examiner Building Plans Examiner CBC  
Certified Building Official                                               |
| Andrea Coley, Administrative Project Manager |                                                 | 20+ years of experience     | Sacramento Valley Association of Building Officials (SVABO)  
Napa/Solano County Chapter  
International Code Council (ICC)  
Yosemite Chapter of the ICC  
East Bay Chapter of the ICC  
Peninsula Chapter of the ICC  
California Building Officials (CALBO)  
2010 Outstanding Industry Member Award - SVABO  
2011 Outstanding Industry Member Award - SVABO                                               |
| Bill Bixby, P.E., Civil Plan Review Engineer | M.S., Civil Engineering  
B.S., Geotechnical Engineering                               | 30+ years of experience     | Registered Professional Engineer:  
CA, #48819                                                                                  |
| Monte Bowers, P.E., Civil Plan Review Engineer | B.S., Civil Engineering                                      | 35+ years of experience     | Registered Professional Engineer:  
CA, #26493                                                                                  |
| John Che, P.E., Q.S.D./Q.S.P., Civil Plan Review Engineer | B.S., Civil Engineering                                      | 21+ years of experience     | Registered Professional Engineer:  
CA, #51393  
CASQA Certified:  
QSD and QSP #24550                                                                        |
| Steven W. Beswick, P.E., Civil Plan Review Engineer | B.S., Civil Engineering  
Resident Engineers Academy                                      | 26+ years of experience     | Registered Professional Engineer:  
CA, #41786  
Caltrans Resident Engineer                                                              |
| Joe Aroyo, P.E., Civil Plan Review Engineer | B.S., Civil Engineering  
Certificate in Engineering Management for Public Works              | 36+ years of experience     | Registered Professional Engineer:  
CA, #36086                                                                                  |
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<tbody>
<tr>
<td>Michael Middleton, P.E.,</td>
<td>B.S., Civil Engineering</td>
<td>25+ years of experience</td>
<td>Registered Professional Engineer:</td>
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<td>Civil Plan Review Engineer</td>
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<tr>
<td>Craig Hamner, P.E.,</td>
<td>B.S., Civil Engineering</td>
<td>30+ years of experience</td>
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<tr>
<td>Jee Choy, P.E.,</td>
<td>M.S., Civil Engineering B.S., Civil Engineering</td>
<td>30+ years of experience</td>
<td>Registered Professional Engineer:</td>
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<td>Civil Plan Review Engineer</td>
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<tr>
<td>Michael Foreman, P.L.S.,</td>
<td></td>
<td>24+ years of experience</td>
<td>Registered Professional Land Surveyor: Arizona P.L.S. 32225</td>
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<td>Plan Review and Senior Surveyor</td>
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<td>California P.L.S. 5778</td>
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<td>Nevada P.L.S. 11430</td>
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<td>Registered Nevada State Water Right Surveyor No. 1041</td>
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<tr>
<td>Anthony Small,</td>
<td>B.S., Highway and Traffic Engineering</td>
<td>35+ years of experience</td>
<td>AutoCAD, Kelar Corporation Instructional Certification</td>
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<tr>
<td>Civil Plans Examiner</td>
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<td>Civil Engineering Application Eagle Point, AutoCAD Land Desk</td>
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<td>Civil 3D, Autoturn</td>
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<tr>
<td>Steve McCarthy,</td>
<td></td>
<td>33+ years of experience</td>
<td>Registered Professional Engineer:</td>
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<td>Civil Plan Review</td>
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<td>CA, #42260</td>
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<td>Registered Structural Engineer:</td>
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<td>LEED Accredited Professional</td>
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<td>DSA Certified Structural Reviewer</td>
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<td>DSA Certified Access Reviewer</td>
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<tr>
<td>Alan Ho, S.E., LEED AP,</td>
<td>M.S., Civil Engineering B.S., Civil Engineering</td>
<td>29+ years of experience</td>
<td>Registered Professional Engineer:</td>
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<tr>
<td>Troy Schmidt, S.E.,</td>
<td>M.S., Civil Engineering, Structural Emphasis B.S., Civil and Environmental Engineering</td>
<td>15+ years of experience</td>
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<td>Registered Professional Engineer:</td>
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<td>Eric Rodriguez, S.E.,</td>
<td>B.S., Civil Engineering</td>
<td>15+ years of experience</td>
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<tr>
<td>Cristian Son, P.E.,</td>
<td>M.S. Electrical Engineering Minor in Electro-Mechanical Applications</td>
<td>20+ years of experience</td>
<td>Registered Electrical Engineer:</td>
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<td>Electrical Plan Review</td>
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<td>CA, #16910</td>
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<tr>
<td>Engineer</td>
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<tr>
<td>Steven Block, P.E.,</td>
<td>B.S. Electrical Engineering B.S. Physics</td>
<td>20+ years of experience</td>
<td>Registered Electrical Engineer: CA, #14716 ICC Certified Electrical Plans Examiner</td>
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<td>George Kellogg, P.E.,</td>
<td>B.S., Civil Engineering B.A., Geology</td>
<td>36+ years of experience</td>
<td>Registered Civil Engineer, CA #42367 ICC Certified Building Official ICC Certified Plans Examiner</td>
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<tr>
<td>Wendy Haggard, P.E.,</td>
<td>M.S., Civil Engineering B.S., Civil and Environmental Engineering</td>
<td>10+ years of experience</td>
<td>Registered Professional Engineer, CA #66422</td>
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<tr>
<td>Daryl Willey, P.E.,</td>
<td>B.S., Architectural Engineering</td>
<td>30+ years of experience</td>
<td>Registered Professional Engineer: CA, #25941 Lifetime Certified Instructor for California Community Colleges Damage Assessment - OES, SEAOC, CSTI ICC Certified: Accessibility Inspector/Plans Examiner Building Inspector CA Combination inspector CA Commercial Building Inspector CA Commercial Combination Inspector CA Commercial Electrical inspector CA Commercial Mechanical Inspector CA Commercial Plumbing inspector CA Residential Building inspector CA Residential Combination Inspector CA Residential Electrical Inspector CA Residential Mechanical inspector CA Residential Plumbing Inspector Combination Dwelling inspector Combination inspector Commercial Electrical Inspector Commercial Mechanical Inspector Electrical Inspector Mechanical inspector Permit Technician Plumbing Inspector Plumbing Inspector UPC Residential Combination inspector</td>
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<td>Plan Review Engineer</td>
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<td>Mac Saberi, P.E.,</td>
<td>B.S., Civil Engineering</td>
<td>34+ years of experience</td>
<td>Registered Professional Engineer, CA #61937</td>
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<tr>
<td>David Gavranich, E.I.T., Plans Examiner</td>
<td>B.S., Civil Engineering</td>
<td>15+ years of experience</td>
<td>ICC Certified Building Plans Examiner&lt;br&gt;CAL Green Plans Examiner&lt;br&gt;California Engineer in Training</td>
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<td>Rick Mauldin</td>
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<tr>
<td>David C. Lipscomb</td>
<td>B.S., Business Administration</td>
<td>27+ years of experience</td>
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<td>General Contractor: Lic. #: 494465</td>
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<tr>
<td>Rhonda Gannon</td>
<td>A.A., Construction Management/Building Inspection Technology</td>
<td>30+ years of experience</td>
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<td>Dan Larsen, CASp, Plans Examiner</td>
<td>A.S., Engineering and Math</td>
<td>30+ years of experience</td>
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<td>Leon McNeil</td>
<td>B.S., Economics</td>
<td>35+ years of experience</td>
<td>ICC Certified Residential Combination Inspector</td>
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<tr>
<td>Allen Tsui, F.P.E.,</td>
<td>M.S., Engineering</td>
<td>11+ years of experience</td>
<td>Registered Fire Protection Engineer: CA, 1646</td>
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<tr>
<td>Fire Plan Review Engineer and Inspector</td>
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<tr>
<td>Andrew Reilwich</td>
<td>Completed Coursework, Fire Technology</td>
<td>25+ years of experience</td>
<td>California CCW Sacramento Metropolitan Fire District Fire Inspector Academy Graduate - Fire Inspector II</td>
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<tr>
<td>Byron &quot;BJ&quot; Foster</td>
<td>A.A., Fire Science</td>
<td>20+ years of experience</td>
<td>HAZWOPER 40 for Instructors</td>
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<tr>
<td>Douglas Evans, F.P.E.,</td>
<td>B.S., Engineering - Fire Protection</td>
<td>22+ years of experience</td>
<td>Registered Fire Protection Engineer: CA, #1264, NV, #010951</td>
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<tr>
<td>Joseph W. Eisele</td>
<td>Building Inspection Technology</td>
<td>15+ years of experience</td>
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<tr>
<td>Patrick O'Connor</td>
<td>A.S., Building Technology</td>
<td>25+ years of experience</td>
<td>ICC Certified Building Inspector, AWS Certified: 3-G Vertical Up 7018 Rod, 4-G Overhead 7018 Rod</td>
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<tr>
<td>Brian Elder</td>
<td>Coursework Building Inspection Technology</td>
<td>14+ years of experience</td>
<td>ICC Certified Building Inspector, ICC Certified Building Inspector CBC, IAPMO Certified Plumbing Inspector, IAPMO Certified Mechanical Inspector, CSLB General Contractor &quot;B&quot; License #763319, POST PC 832 Arrest Techniques</td>
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<tr>
<td>Michael J. Robinson</td>
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<td>10+ years of experience</td>
<td>ICC Certified: Building Inspector, Mechanical Inspector UMC, Plumbing Inspector UPC, Residential Electrical Inspector</td>
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<tr>
<td>Andres Kortright</td>
<td>A.A., Construction Technology</td>
<td>20+ years of experience</td>
<td>ICC Certified: Building Inspector, Commercial Mechanical Inspector, Mechanical Inspector, Plumbing Inspector UPC, Residential Electrical Inspector, Residential Mechanical Inspector</td>
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<tr>
<td>David Pascoe</td>
<td>David Pascoe, Inspector</td>
<td>20+ years of experience</td>
<td>ICC Certified: Building Inspector, Electrical Inspector, Mechanical Inspector UMC, Plumbing Inspector</td>
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</table>
REFERENCES

The most important selection criteria for clients that choose Bureau Veritas is expertise. Having provided QHSE services for over a century, we are the foremost expert in the field. Our greatest asset is our reputation. That reputation comes from the best experts in the industry, all acting with the utmost integrity and ethics. Descriptions of previous projects provided in TAB B, relate to the below client references and services we have provided them.

References of Similar Services We are Providing

<table>
<thead>
<tr>
<th>City of West Sacramento</th>
<th>City of Sacramento</th>
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<tbody>
<tr>
<td><strong>Building and Safety Administration Services</strong></td>
<td><strong>Plan Review and Inspection Services</strong></td>
</tr>
<tr>
<td>Randy Goodwin, Chief Building Official</td>
<td>Winfred DeLeen, Building Official</td>
</tr>
<tr>
<td>1110 West Capital Ave., 2nd Floor</td>
<td>300 Richards Blvd., 3rd Floor</td>
</tr>
<tr>
<td>West Sacramento, CA 95601</td>
<td>Sacramento, CA 95811</td>
</tr>
<tr>
<td>T. 916.617.4545</td>
<td>T. 916.505.5475</td>
</tr>
<tr>
<td>E. <a href="mailto:randyg@cityofwestsacramento.org">randyg@cityofwestsacramento.org</a></td>
<td>E. <a href="mailto:WDeLeen@cityofsacramento.org">WDeLeen@cityofsacramento.org</a></td>
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<tr>
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<td><strong>Building and Engineering Plan Review and Inspection Services</strong></td>
<td><strong>Development Plan Review Services</strong></td>
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<tr>
<td>Scott Byrne, Building Official</td>
<td>Ron LaFrance, Chief Building Official</td>
</tr>
<tr>
<td>311 Vernon Street</td>
<td>701 Laurel Street</td>
</tr>
<tr>
<td>Roseville, CA 95678</td>
<td>Menlo Park, CA 94025</td>
</tr>
<tr>
<td>T. (916) 774-3332</td>
<td>T. 650.330.6723</td>
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<tr>
<td>E. <a href="mailto:sbyrne@roseville.ca.us">sbyrne@roseville.ca.us</a></td>
<td>E. <a href="mailto:rlafrance@menlopark.org">rlafrance@menlopark.org</a></td>
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<tr>
<td><strong>Engineering Review, Map Checking and Land Surveying Services</strong></td>
<td><strong>Building Plan Review and Inspection Services</strong></td>
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<tr>
<td>James Patrick, Senior Civil Engineer</td>
<td>Gene Ashdown, Chief Building Official</td>
</tr>
<tr>
<td>1000 Webster Street</td>
<td>318 First Street</td>
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<tr>
<td>Fairfield, CA 94533</td>
<td>Winters, CA 95694</td>
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<tr>
<td>T. 707.432.7470</td>
<td>T. 530.795.4910</td>
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<tr>
<td>F. 707.432.7907</td>
<td>E. Gene <a href="mailto:Ashdown@cityofwinters.org">Ashdown@cityofwinters.org</a></td>
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<tr>
<td>Dates of Service: 2007 - Present</td>
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CASE STUDIES & EXPERIENCE

Bureau Veritas has a long-established and successful track record. For over 38+ years BVNA has provided comprehensive municipal consulting services, including plan check, map check, and building field inspection services, throughout Northern California and the Western United States. The following is a summary of BVNA’s experience over the past five years in performing similar services for public entities, including county, city and municipal clients.

**Plan Check, Map Check and Inspection Experience**

**CITY OF WEST SACRAMENTO**
Building & Safety Administration Services

Dates of Service: 1998 - Present

Bureau Veritas is proud to be part of the legacy of excellence and well-earned reputation for outstanding customer service that the City of West Sacramento enjoys today. Our team of professionals provides plan review, building inspection, fire plan review and field inspection services that include compliance with Title 24, Part 9 and Title 24, Part 2 for fire and life safety, code interpretation, and recommendations for alternate means of fire protection for more than a decade. We also provide support in the Building Department regarding fire code issues, participate in training for other departments of the City.

**Select projects include**

**Springhill Suites**
Springhill Suites’ new 4-story, 110-room hotel is located in West Sacramento, with a building area of approximately 66,429 sf. The site is at the entrance to the large cluster of warehouses, offices, distribution plants and laboratories along the Sacramento River waterfront. Type of construction – V-A. Occupancy groups include A-2, A-3, B and R-1. Total construction valuation for the project was $10,200,000.

**Delta Lane Project**
Delta Lane is a new 4-story, 77 Unit, mixed-use, affordable and market-rate project on Tower Bridge Gateway just west of Raley Field. The Tower Bridge retail shell is connected to a new multi-family building with parking under parking. This three-acre property is located on the south side of West Capitol Avenue west of Raley Field. Type of construction – V-A. Total construction valuation for the project was $16,239,700.

**Bayer CropScience Research and Development Facility**
Bayer CropScience’s new facility in West Sacramento will span approximately 150,000 sf with around 10 acres for a greenhouse facility. This facility will also include office space, laboratory space, pilot plant, and test plot facility. This new site will be used to expand and accelerate the development of innovative products.
Bureau Veritas was selected to provide outside plan review and inspection services for the City of Sacramento in 2011. Our staff has reviewed more than 100 projects for conformance with the 2010, 2013, and 2016 California Building, Electrical, Mechanical, Plumbing, Energy, and Green Building Codes. Our inspectors provide residential and commercial inspections during regular City hours on a part time basis.

Select projects include:

**Mitsubishi Rayon Carbon Fiber & Composites**
Provided expedited architectural, mechanical, plumbing, electrical, T-24 energy, compliance, disabled access, green building standards, structural plan review services for the Mitsubishi phased permit projects. The project consisted of an expansion of the existing 85,000 sf of manufacturing/warehouse building space with an addition of 30,000 sf of manufacturing space, 10,000 sf of maintenance space, and replacement of 3,960 sf of manufactured office space trailers with a two-story office building totaling 16,000 sf. The phased permits were provided for the maintenance addition, grading and foundations. Occupancy groups included F-1 & B 1-1 and Construction types of III-B and II-B for the one story factory building and two-story office building & Warehouse portions.

**New King’s Arena - Lateral Review**
Provided the lateral review of the new NBA multi-use arena. The new arena seats 17,500 fans across 609,000 sf and is valued at $417 million. The total space of the arena including parking, office space, restaurant, and sales office will be more than 1,000,000 sf. The arena structure rises approximately 102 feet from the basement level to the top of the roof. The first 40 feet of the structure consists of rigid concrete shear wall with the remaining 62 feet being flexible steel brace frame. Our structural engineer utilized RISA 3-D software to review the design modeling approach used for the lateral resisting system and verify that calculations are correct. BVNA reviews plans as they are revised to address any code issues that arise during the structural analysis.

**Hyatt Regency Ballroom Remodel**
Provided structural and architectural life safety plan review of this $11 million remodel of the Hyatt Regency Ballroom. The remodel included new finishes to the existing ballroom, replacement of the existing operable walls with new operable wall panels, new doors, frames, and hardware, installation of new energy efficient lighting and lighting controls, and limited accessibility upgrades to the public restrooms.

**Jackson Road Connector Building**
BVNA staff reviewed for compliance with mechanical, plumbing, electrical, and T-24 Energy requirements for this 2-story, B occupancy, III-B construction type connector building that connects two existing buildings. The connector building is approximately 7,400 sf and will include restrooms and site renovations.
Bureau Veritas was selected to provide in-house plan review for public works and engineering projects. Currently we provide two licensed professional engineers to review new development and infrastructure projects. Since 2011, we have performed building and engineering plan review for over 850 projects. In addition to our public works staff, BVNA provides outside plan review services for building projects such as master plans, commercial, and industrial projects. Previously, we provided an in-house permit technician to assist the public counter as well as an in-house building plans examiner and public works plan reviewer. We provide electronic plan review which allows for economical movement of plans and quick turnaround, eliminating shipping time and costs.

Select projects include:

**Westfield Galleria Mall**
BVNA was contracted to provide expedited review of tenant improvement projects to rebuild 230,000 sq ft of damage to one wing of the Westfield Galleria Mall. Westfield, LLC selected Bureau Veritas to provide final review of all tenant plans by Landlord requirements in accordance with Westfield's Retail Tenant Criteria Manual and Tenant Improvement Permit Application Manual. Concurrently with the Landlord's tenant review, Bureau Veritas staff reviewed plans for compliance with Title 24 California Code of Regulation requirements adopted by the City of Roseville. Upon completion of Landlord requirements and code review by Bureau Veritas, plans were stamped with Bureau Veritas "Reviewed for Code Compliance" seals and the original signatures of the plan reviewer. The plans were accepted by the City of Roseville and a permit to construct was issued "over the counter".

**Vannelli Foods**
Tenant Improvement conversion of 42,655 sf of existing warehouse to food processing facility for fresh and quick frozen pasta products. Improvements included electrical, mechanical, plumbing and fire life safety upgrades for preparation, cooking and packaging operations in a clean environment. Plan check also included Fire Code review of cryogenic gases used in packaging.

**Westbrook Village Subdivision**
The Westbrook property encompasses approximately 400 acres and is located in the northwest portion of the The Sierra Vista Specific Plan (SVSP). Phase 1 allows for development of approximately 117.5 acres in the northeast corner of the Westbrook area. We provided map check and engineering plan review services for the Westbrook Phase 1 Master Plans including Pleasant Grove improvements, Sierra Trail Drive A and B, Mass Grading, Mountain Glen Improvements, Westbrook Ph. A and B Improvements, and SVSP Westbrook Large Lot. Bureau Veritas staff reviewed plans for compliance with Title 24 California Code of Regulation requirements adopted by the City of Roseville for review of the Westbrook Phase 1 Village SVSP Ph. 1, Village SVSP Ph. 2, and Village 8.
CITY OF FAIRFIELD
Engineering Review, Map Checking
and Land Surveying Services
Dates of Service: 2007 - Present

Bureau Veritas has provided map review and land surveying services for the City of Fairfield for over 10 years and has completed several engineering review and map checking projects.

Select projects include:

**The Cottages of Fairfield**
Final Map Review for the Cottages. The Cottages is a four acre development that will include nearly 46 single family attached homes with a private park. These single family homes will be more than 2,500 sf with up to six bedrooms.

**Garibaldi Ranch, Unit 6**
Final Map Review for the Garibaldi Ranch. The Garibaldi Ranch Unit 6 projects is a proposed residential family subdivision which would include 205.85 acres housing 675 lots varying in size from 4,000 sf to over 20,000 sf. Bureau Veritas provided the review of the final map to verify conformance to the requirements of the Subdivision Map Act, the City of Fairfield Municipal Code, the approved Tentative Map, and the Conditions of Approval.

**Gold Hill Village**
Final Map Review for the proposed Gold Hill Village. The Gold Hill Village will include 86 homes situated on 11.5 acres originally zoned for commercial development. Bureau Veritas provided the review of the final map for the proposed residential development.

**Gold Ridge, Unit 10**
Final Map Review for the Gold Ridge Unit 10. The Gold Ridge Unit 10 is a 230 lot subdivision covering 62 acres.

"The Bureau Veritas staff is open, responsive, professional, informative, and totally committed to customer service. The West Sacramento Bureau Veritas staff is an indistinguishable part of the West Sacramento team. Their work is a perfect fit for the problem solving ‘can-do’ ethos of West Sacramento staff and residents."

— Randy Goodwin, AIA, LEED AP, Building Official, City of West Sacramento.
Since 2006, Bureau Veritas has provided review for conformance to City standards, Building Codes and NPDES enhanced clean water provisions. Bureau Veritas has completed for all civil work for building permits including grading and drainage, hydraulics and hydrology, infrastructure, utilities and parking. Our Development Plan Review staff has reviewed a variety of projects.

Select projects include:

**Facebook East Campus**
The East Campus is 56.9 acres and is currently developed with 5 buildings which contain approximately 1,035,840 sf. Facebook has implemented a vehicular trip cap which allows approximately 5,500 employees to occupy the East Campus. BVNA provided civil building permit review for compliance with California Building Code, the City’s Water Efficient Landscape Ordinance, and NPDES Cleanwater requirements.

**Facebook West Campus**
The West Campus is approximately 22 acres with a 500,000 sf office building featuring underground parking and a green roof.

**Lot Line Adjustment: Facebook West Campus**
Reviewed the lot line adjustment for the Facebook West Campus which shared a border with Tyco Electric. The line was adjusted to accommodate the new west campus.
Water Transmission and Wastewater Treatment Experience
BVNA has been a leader in the inspection of large diameter steel water transmission pipe and engineered equipment associated with this industry. Throughout the years, as the specification tolerances have become more stringent, Bureau Veritas has provided specialty training to the inspectors to reflect the new client specifications. Bureau Veritas is routinely requested to aid in the development of more rigorous client inspection specifications and inspection test plans in this industry. Services provided to our Water Transmission and Wastewater Treatment clientele, Bureau Veritas regularly inspects Ductile Iron Pipe, Spiral-Welded Pipe, ERW Pipe and large diameter heavy wall Can Pipe at mills throughout the United States, Japan, South America and Europe.

Mariani Waste Water Treatment Plant
Solano County
Contact: David Cliche, Chief Building Official
675 Texas St. Suite 5500
Fairfield, CA 94533
(707) 374-2205
dwcliche@solanocounty.com

US Filter/Industrial Wastewater System (USF/IWS) and GSE Construction Co. have undertaken the design and construction of a complete wastewater pretreatment system for the Mariani Packing Company’s processing facility at 500 Crocker Drive in Vacaville. The system utilizes an anaerobic reactor and multi-stage settling and aeration tanks to treat the plant’s process wastewater for eventual discharge to the Easterly WWTP.

Colusa Generating Station
City of Colusa
Contact: Jon Maring, Senior Director, New Fossil Generation
245 Market Street,
San Francisco, CA 94105
(415) 290-4924
J8M4@pge.com

The Colusa Generation Stations is a combined cycle power plant using Dry Cooling technology. The project has a nominal electrical output of 660 MW with commercial operation. The project is fueled by natural gas delivered to the site via a new 8 inch, 1,500-foot pipeline owned and operated by PG&E. Transmission interconnection requires four (4) double circuit 230 kV lines that connect to PG&E’s existing 230 kV north-south transmission lines located approximately 1,800 feet east of the project site.
Alvarado Water Expansion Project, Phase 1
Client: City of San Diego
Bureau Veritas provided shop inspection services on behalf City of San Diego on the Alvarado Water Expansion Project through a contract with CH2M Hill Engineers. This project consisted of the shop fabrication inspection of over 8,000 ft of 26” though 86” diameter spiral welded pipe fabricated entirely into specialty fittings. Bureau Veritas staffed this project at two different locations throughout the United States simultaneously providing welding and specialty coatings inspection services.

Bureau Veritas provided the above referenced services at the following locations:
Steel Pipe and Fittings
- Northwest Pipe Company, Denver CO
- N. American Pipe, (Northwest Pipe), Saginaw, TX

Inspection Services For Capital Improvement Projects
Client: Calleguas Municipal Water District
Bureau Veritas provided both field and shop Inspection Services for Calleguas Municipal Water District for several Capital Improvement Projects consisting of the shop fabrication of large diameter water transmission pipe and fittings. In addition to the water transmission projects, Bureau Veritas also provided shop inspection of plate and structural steel related components associated with the construction of two 5 Million Gallon and one 2.5 Million Gallon steel reservoirs. The field inspections consisted of erection, welding inspection and protective coatings inspection. Bureau Veritas staffed this project at various California fabrication plants.

In Plant Inspection As-Needed Support Services
Client: San Diego County Water Authority
Bureau Veritas provided shop inspection services for San Diego County Water Authority on the following projects:
- Moreno Lakeside Project (2002)
- Helix 6, 7, 8 FCF Project (2001)
- Olivenhain Pump Station Project (2002)
- Otay 14 FCF Project (2001)

Bureau Veritas provided inspection services of large diameter spiral welded and can pipe ranging from 62” to 110” diameter that were fabricated into specialty fittings and vault structures. Inspection services too place at several locations throughout the United States of Ball Valves, Butterfly Valves and Sleeve Valves ranging from 6” to 42” in diameter, which consisted of the witness of seat leak test, hydrostatic test, operational tests and coating inspections. Bureau Veritas provided the above referenced services at the following locations:

Steel Pipe and Fittings
- Jiffco Pipe Fabricators, Livermore, CA
- California Pipe Fabricators, Dixon, CA
- International Pipe Fabricators, Heber, CA
- Ameron International, Fontana, CA
- Northwest Pipe Fabricators, Adelanto, CA and Portland OR
- Roscoe Moss Fabricators, Los Angeles, CA
Additional Plan Check and Inspection Experience

Third Party Plan Review
City of Stockton

Bureau Veritas frequently provides third party plan review services to the City of Stockton. We have provided full plan review as well as partial plan review to clients requiring a quick turnaround, or who may have complex projects needing plan review engineers with specialized experience.

Partial list of projects include:

- Staples Distribution Warehouse - 401,000 square feet - Addition
- University Plaza Waterfront Hotel - 7-Story - Remodel
- Super Walmart Revisions - 180,000 square feet
- Cost Plus World Market - TI Conversion to Mercantile
- Citadel Broadcasting - TI - 17,000 square feet broadcasting facility

Staples Distribution Warehouse: 401,000 square feet - Addition and Building Connections
The Staples Distribution Warehouse constructed a 60'x390' connector to combine two buildings into one structure. Occupancy includes B and S-1 with a Construction Type of III-N.

University Plaza Waterfront Hotel: 7-Story Mixed Use Building - Remodel
This project consisted of the remodel of 42 condominium units on floors 5, 6, and 7, of the University Plaza Waterfront Hotel. BVNA provided a full review including disabled access for these 2 conversion floors.

Super Walmart Revisions: 180,000 square feet
Cost Plus World Market: TI Conversion to Mercantile
Citadel Broadcasting: TI - 17,000 square feet broadcasting facility

Plan Review Services
City of Burlingame

Bureau Veritas staff reviews plans for a wide range of projects for the City of Burlingame. Staff has reviewed commercial buildings, condominiums, office buildings, medical offices, residential projects, tenant improvements of various complexities as well as buildings for assembly occupancies. Bureau Veritas provides a plan review licensed engineer two days per week to the City.
Building and Safety Administration  
City of West Sacramento

Additional projects include:

City Hall: Completed in December 2003, this landmark building in the City of West Sacramento has set the tone for the revitalization of West Capitol Avenue, the City’s main thoroughfare. This project came in on time and under budget with the help of our plan checkers and inspectors becoming an integral part of the construction team. Total construction valuation for the project was $8,238,659.

CalSTRS Headquarters: The owner desired to achieve a LEED Gold rating on this new headquarters building which incorporated mixed-use elements and energy-efficiency into the design and operation. Consequently, not only were minimum standards of code enforced, but our Inspector-of-Record also monitored that plans and specifications were followed closely to achieve the desired LEED Gold rating designation. Additionally, construction utilized a unique “team-build” approach to enable simultaneous development and construction that reduced planning time as well as development and construction costs.

River Cats Stadium: The River Cats has become synonymous with family fun and great sports. Our pennant winning team provides low-cost fun and builds community pride not only for the City of West Sacramento citizen’s but for the entire Sacramento area. It has now become a venue for musical events that normally would be conducted out of the area. Once again our plan check team and inspectors continually work closely with River Cats management team to bring the safest experience possible for everyone.

IKEA Store: This 330,000+ sq. ft. retail facility has a complicated exiting plan, many mixed uses, and is designed with strict European guidelines that do not always match Title 24 requirements. The IKEA project the exiting system was extensive and complex while the building facility also called for high pile storage for racks approximately 35’ high as well while incorporating a complex fire sprinkler system. Exit signs were added to help clarify the door locations upstairs.

Fuel Cell Facility: The facility, which has been open for more than 6 years, is on the cutting edge of automotive fuel technology. Its main driving force is to find efficient methods of fuel without exploiting the existing petroleum supplies throughout the world.

Jackson Laboratory: This ever growing laboratory raises genetically altered mice in clean rooms to discover and determine the outcomes of genetic changes and defects to a normal DNA system. This is the largest facility on the West Coast and is a direct support for the UC Davis Animal Facility Center.

Old Dominion Freight Line: This project includes a 75,274 square foot trucking terminal, 19,118 square foot maintenance shop, 14,466 square foot dock canopy and 3,200 square foot fueling station canopy. Total project valuation is approximately $9.5 million.
ATTACHMENT A

Statement Of Qualifications for City of Stockton
PUR 17-001 | On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management

Building Plan Review & Inspection, CalPERS

Headquarters

City of Sacramento

Client: Kleinfelder
Contact: Ted Olen, Manager,
Construction Materials Testing
3077 Fite Cr.,
Sacramento, CA 95827
(916) 966-1701

Dates of Service: 2002 – 2010

Bureau Veritas was commissioned to provide an ADA, T-24 Accessibility Survey for the State of California’s CalPERS Retirement headquarters located in Sacramento. Our duties included the review and inspection of the exterior and interior to the facility as well as to review and inspect the site for access compliance. The inspection included thousands of photos. Detailed reports for each of the floors were developed. Bureau Veritas also provided building inspection and quality assurance services for the $200 million CalPERS expansion project. Two full-time inspectors were onsite to provide required building inspection services as well as to oversee all special inspections and testing for the project. Three CalPERS buildings are located at 400 Q Street, Sacramento. The CalPERS Lincoln Plaza East/West expansion building is 560,000 sf. above ground with office and retail, 440,000 sf. two levels below ground, and includes 1,000 parking spaces. The CalPERS Lincoln Plaza North building is a six-story, 492,900 sf. office and retail building with 190,000 sf. of parking one level underground, with 415 spaces.

The high-tech nature of the building and desire to achieve a LEED Gold rating brought numerous technical challenges associated with potential groundwater issues with below-grade parking levels and incorporation of a six-story atrium and smoke control. Our Inspector-of-Record supervised special inspectors and proactively maintained close communication with the owner, construction manager, and stakeholders (e.g. including the State Fire Marshall’s office) to address challenges quickly and to the satisfaction of the owner. One solution included recommending and observing cold smoke testing to monitor that smoke control levels would meet fire code requirements within the six-story atrium. This was successfully done on the initial test. Our staff also provided detailed inspection reports which also offered recommendations to efficiently resolve code issues during the construction phase.
Plan Review Services
City of Lincoln

Bureau Veritas staff reviews plans for a wide range of projects for the City of Lincoln. Since the start of our relationship with the City we have reviewed several complex projects such as the Twelve Bridges Golf Course and Country Club, several master plan sets for new residential development, and large retail facilities, among others. We have also provided several inspectors over the years to provide Inspection services to the City when the City underwent unprecedented growth in recent years.

"We can call Bureau Veritas and they are responsive to our needs; this is something that they take pride in. They are certainly a company that stands behind their customer service."

Todd Cunningham, Building Official, City of Lincoln

Inspection Services
City of Rancho Cordova

Bureau Veritas provides a full time Sr. Combination Building Inspector to the City of Rancho Cordova who works as an extension of the City staff and is able to perform many daily inspections as well as plan review. Recent projects include the construction of a new Walgreens, the Mather campus office building and a CVS pharmacy. Other recent projects also include:

Cordova Restaurant and Casino: Our inspector has been involved with the Cordova Restaurant and Casino project which included the total remodel of an existing building. The building and site needed to be brought up to current accessibility standards while complying with a tight construction time frame.

Target: This project included the construction of a new target store. Bureau Veritas staff had to ensure that the extremely tight construction schedule could be met.

Kohl's: This 78,398 square foot project included the complete demolition of the interior of an existing Mervyn's retail store as well as the interior improvements for Kohl's. The project was completed on a very tight construction schedule and included outdoor accessibility upgrades to the existing entrances and parking lot.
Professional Service Fees
SCHEDULE OF FEES - REVISED 5/23/2017

Our pricing reflects our commitment to the success of your project by helping you maintain significant quality and cost saving benefits moving forward.

These include:
- Reduced plan review turnaround times and quick inspection response time
- Commitment to maintain a proposed rate structure for the life of the initial contract period
- Highly qualified staff
- Confidence of working with a well-established consultant in business for 185+ years
- Next day inspections
- Same day inspections for urgent matters

Hourly rates for project personnel are outlined below:

<table>
<thead>
<tr>
<th>Staff Level Classifications</th>
<th>Hourly Billing Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structural Engineer</td>
<td>$130</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$120</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$120</td>
</tr>
<tr>
<td>Building Official</td>
<td>$130</td>
</tr>
<tr>
<td>Plan Reviewer</td>
<td>$105</td>
</tr>
<tr>
<td>CASp Plan Reviewer/Inspector</td>
<td>$110</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review/Certification</td>
<td>$125</td>
</tr>
<tr>
<td>Certified Floodplain Manager</td>
<td>$130</td>
</tr>
<tr>
<td>Combination Inspection</td>
<td>$100</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$70</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>$65</td>
</tr>
<tr>
<td>Fire Plan Review</td>
<td>$120</td>
</tr>
</tbody>
</table>

*Pricing assumes that this contract is non-prevailing wage - for any prevailing wage projects, BVNA will discuss rates with the City to account for the California Prevailing Wage requirements.

Overtime: All Employees classified as “non-exempt” by the U.S. Department of Labor will be compensated at 1-1/2 times salary for overtime hours as per State and Federal wage and hour laws. No overtime will be charged without prior consent.

This fee proposal is valid from January 1, 2017 thru December 31, 2017 and is subject to annual review and adjustment, with the approval of the City.
Resolution No. 2017-06-20-1103

STOCKTON CITY COUNCIL

RESOLUTION AUTHORIZING THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

Development is cyclical, and during an improving economy the demand for building plan review and inspection services can outpace staffing levels; and

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods; and

On March 29, 2017, a Request For Qualifications (RFQ) for development related Building Plan Check, Inspection and Engineering on-call services was posted to the City's Bid Flash web page in order to develop a pool of qualified firms (PUR 17-001); and

RFQs were reviewed by an evaluation panel consisting of three CDD staff and selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service and total hourly cost rate to the City; and

Four out of the five firms were recommended for the pool as follows: 4LEAF, Inc. Fair Oaks, CA; CSG Consultants, Inc., Sacramento, CA; Bureau Veritas North America, Inc., Sacramento, CA; and West Coast Code Consultants, Inc., San Ramon, CA; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. The "Professional Services Master Agreement," attached hereto as Exhibit 2 and incorporated by this reference, between the City of Stockton and each of the following firms is hereby authorized and approved for the establishment of a Vendor Pool:

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

   Firm qualifications, staffing plans, and standard hourly rates schedules are found in Exhibit 1, which is also attached and incorporated by this reference.
2. The City Manager is hereby authorized and directed to execute the Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.

3. The City Manager is hereby authorized to enter into amendments to the Professional Services Master Agreement with each of the firms in the vendor pool in a total amount not to exceed $480,000 across all vendors.

4. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED June 20, 2017.

ATTEST:

MICHAEL D. TUBBS
Mayor of the City of Stockton

BONNIE PAIGE
City Clerk of the City of Stockton
AUTHORIZE THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

RECOMMENDATION

It is recommended that the City Council adopt a resolution to authorize the City Manager to:

1. execute a Professional Services Master Agreement with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. execute amendments to the Professional Services Master Agreement for individual projects in an amount not to exceed $480,000 across the entire vendor pool; and

3. authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the resolution.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. The Community Development Department (CDD) is completing multi-year forecasts and staffing to the lowest estimated need in the upcoming years. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as specialized staff availability for unique or very complicated projects.

Therefore, staff recommends Council adopt a resolution to authorize the City Manager to execute a Professional Services Master Agreement with four professional firms as detailed above for an initial three-year term with an option to extend the agreement for
up to two additional one-year periods. Costs associated with the Professional Services Master Agreement are covered by fees collected from each project applicant before plan reviews or inspections are conducted. Compensation under the proposed agreement is limited to a cumulative amount of $480,000 for all vendors.

**DISCUSSION**

**Background**

As part of the current fiscal year budget development and adoption, a combination of modest staffing increases and use of consulting services was determined to be the most responsible way to address increasing development activity and increased demand for Building Division activities such as plan check (building, engineering, and backup fire plan check), inspection, counter staffing and flood plain management. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring permanent specialist staff.

There has been a rapid increase in development project valuation in the City of Stockton over the last several years as the market continued an upward trend that resulted in increased planning and building permit activity and economic growth. Below, by fiscal year, are building permit valuations for recent fiscal years:

- FY 2012-13: $121 million
- FY 2013-14: $141 million
- FY 2014-15: $215 million
- FY 2015-16: $315 million
- FY 2016-17: $275 million (Projected)

Permit valuation has largely increased due to the volume, type, and complexity of projects as the economy improves. Although projected valuation for FY 2016-17 is expected to dip from that of FY 2015-16, valuations remain robust. Therefore, the CDD plans to continue to utilize consultants to provide the necessary flexibility to respond to cyclical demand, assist when full-time staff shortages occur, and provide specialized knowledge or training when required.

This affords the department the ability to quickly change the scale and scope of staffing support levels to correspond to workload needs at any time while maintaining high levels of customer service. Fees are collected from the applicant before any plan review, or inspection services are performed. Maintaining a pool of multiple firms provides the department the flexibility to select the appropriate consultant based on the specific project-related work and the availability of staff.

The CDD currently maintains two contracts for on-call services (building inspectors and plan checkers, permit technicians, licensed engineers, and certified building officials). Under the existing contracts 4LEAF invoices to date are $281,688.23 and CSG invoices
to date are $260,858.13 (69% expended). Each firm was used based on ability to provide qualified, experienced staff at the time of the City's request. These contracts were originally approved in Fiscal Year (FY) 2015-16 for two years and expire on June 30, 2017. Due to an improving economy and the tightening of the labor pool in specialized building services, having a Professional Services Master Agreement with four consultants will allow the City to provide a better spectrum of services and enable the department to respond to short-term increases in building activity, staff vacancies, and adhere to established timelines, policies, and legal requirements.

**Present Situation**

On March 29, 2017, a Request For Qualifications (RFQ) was posted to the City's Bid Flash web page. Five RFQ submittals were received on April 20, 2017, from the following vendors:

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- EsGil Corporation, a SAFEbuilt Company, Loveland, CO
- West Coast Code Consultants, Inc., San Ramon, CA

An evaluation panel consisting of three CDD staff reviewed the submissions and recommended four out of the five. The selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service, and the total hourly rate cost to the City. The pool of consultants will provide additional coverage for City service demands, and to allow a larger pool of selected consultants the opportunity to complete City work.

The Professional Services Master Agreement will apply to all four firms for services over a three (3) year period, on an as-needed basis, with the total aggregate compensation paid to all four firms not to exceed $480,000 (Exhibit 2 to the Resolution - Professional Services Master Agreement). Each selected firm's statement of qualifications, proposed staffing, and standard rate schedule for services, are included in Exhibit 1 to the Resolution.

Once the Master Agreement is in place, firms can be selected from the pool to perform work specific to each project. Project specific scope of work and fees for professional services will be submitted from the selected firms. Final scope of work and fees will be adopted via an amendment to the Professional Services Master Agreement on a project-by-project basis.

This level of contract capacity will allow the department to adjust resources as necessary to provide high quality, timely work. The CDD continues to implement process improvements while monitoring workload and demand to ensure that full-time and contract staffing levels are appropriately balanced, re-evaluating these needs.
annually. Authorizing the City Manager to execute the Professional Services Master Agreement, and establish the pool will allow the CDD to continue to meet service delivery goals in an efficient, timely, and professional manner.

**FINANCIAL SUMMARY**

Funding for the Professional Services Master Agreement is included in the proposed FY 2017-18 budget for $320,000. The remaining portion of $160,000 is expected to be appropriated in the FY 2018-19 fiscal year budget and funded from the same account.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Code</th>
<th>Amount</th>
</tr>
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<tr>
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<tr>
<td>FY 2018-19</td>
<td>048-1830-530.20-66</td>
<td>$160,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>$480,000</td>
</tr>
</tbody>
</table>
Insurance Requirements for Professional Services

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

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

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

2. **Automobile Liability**: Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than $1,000,000 per accident for bodily injury and property damage.

3. **Workers’ Compensation** insurance as required by the State of California, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than $1,000,000 per accident for bodily injury or disease. *(Not required if consultant provides written verification it has no employees)*

4. **Professional Liability (Errors and Omissions)** Insurance appropriate to the Consultant’s profession, with limit no less than $2,000,000 per occurrence or claim, $2,000,000 aggregate. *(If Claims-made, see below.)*

If the Consultant maintains higher limits than the minimums shown above, the City of Stockton requires and shall be entitled to coverage for the higher limits maintained by the consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City of Stockton.

Other Insurance Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status
The City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers are to be covered as additional insureds on the CGL policy and AL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).

Primary Coverage
For any claims related to this contract, the Consultant's insurance coverage shall be endorsed as primary insurance as respects the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers. Any insurance or self-insurance maintained by the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers shall be excess of the Consultant's insurance and shall not contribute with it. The City of Stockton does not accept endorsements limiting the Consultant's insurance coverage to the sole negligence of the Named Insured.

Notice of Cancellation
Each insurance policy required above shall state that coverage shall not be canceled, except with notice to the City of Stockton.

Waiver of Subrogation
Consultant hereby grants to City of Stockton a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City of Stockton by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City of Stockton has received a waiver of subrogation endorsement from the insurer.

Deductibles and Self-Insured Retentions
Any deductibles or self-insured retentions must be declared to and approved by the City of Stockton Risk Services. The City of Stockton may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

Acceptability of Insurers
Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII if admitted to do business in the State of California; if not admitted to do business in the State of California, insurance is to be placed with insurers with a current A.M. Best's rating of no less than A+:X.
Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

2. If Claims Made policy form is used, a three (3) year discovery and reporting tail period of coverage is required after completion of work.

Verification of Coverage
Consultant shall furnish the City of Stockton with original certificates and amendatory endorsements required by this clause. All certificates and endorsements are to be received and approved by the City of Stockton Risk Services before work commences. Failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The City of Stockton reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time, for any reason or no reason.

Consultant shall, prior to the commencement of work under this Agreement, provide the City of Stockton with a copy of its Declarations Page and Endorsement Page for each of the required policies.

Certificate Holder Address
Proper address for mailing certificates, endorsements and notices shall be:

- City of Stockton
- Attention: Risk Services
- 425 N El Dorado Street
- Stockton, CA 95202

City of Stockton Risk Services Phone: 209-937-5037
City of Stockton Risk Services Fax: 209-937-8558

Maintenance of Insurance
If at any time during the life of the Contract or any extension, the Consultant fails to maintain the required insurance in full force and effect, all work under the Contract shall be discontinued immediately. Any failure to maintain the required insurance shall be sufficient cause for the CITY to terminate this Contract.

Subcontractors
Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City of Stockton is an additional insured on insurance required from subcontractors.
Special Risks or Circumstances
City of Stockton reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.
MEMORANDUM

June 26, 2017

TO: Kurt O. Wilson, City Manager

FROM: David Kwong, Director

SUBJECT: PROFESSIONAL SERVICES MASTER TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES

On June 20, 2017 the above item was approved by City Council by resolution number 17-06-20-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document(s).

DAVID KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DK:mm

Attachments
# CONTRACT ROUTING FORM

**Contract Number:** 2017-OEC-20-1103-01 UP  
(For Clerk’s Use)

**ATTACHMENT A**

## CONTRACT INFORMATION
- **Contract Amount:** $480,000
- **Contract Title:** Professional Services Master Agreement to establish vendor pool for on-call Building Plan Check, et al.
- **Vendor/Other Party:** 4LEAF, Bureau Veritas, CSG Consultants, West Coast Code Consultants (WC3)
- **Contract Start Date:** July 10, 2017  
**Contract End Date:** June 30, 2020  
**Contract Term:** 3-Yrs (2) 1-year ext.

## COUNCIL APPROVAL REQUIRED
- **Council approval required for contracts over $75,000** for FISCAL YEAR: 2017-18
- **Motion/Resolution/Ordinance No.:** 17-06-20-1103  
**Must be Attached:**

## REQUIRED DOCUMENTS
- **Business License Required?**  
- **Bonds Required?**  
- **Insurance Required?**  
- **Notary Required?**

---

### Routing Order

1. **DEPARTMENT: CDD**  
   - **DEPARTMENT HEAD APPROVAL**  
   - **Project Mgr:** Mark Martin  
   - **Ext:** 8544  
   - **Staff:** Jobi Adams  
   - **Ext:** 8564  
   - **Forwarded to:** Rasann Cycenas  
   - **On:** June 28, 2017  
   - **By:** Mark Martin

2. **VENDOR/OTHER PARTY**  
   - **Signed (2) originals on:** June 16, 2017  
   - **Forwarded to:**  
   - **MARK MARTIN**  
   - **On:** June 16, 2017  
   - **By:** BUREAU VERITAS

3. **RISK SERVICES**  
   - **Insurance approved on:** July 5, 2017  
   - **Bonds approved on:** July 5, 2017  
   - **Forwarded to:** Lori Asuncion  
   - **On:** July 5, 2017  
   - **By:** M. MARTIN  
   - **RM #:** 17-307

4. **CITY ATTORNEY**  
   - **Approved as to Form and Content on:** July 6, 2017  
   - **Forwarded to:** Scott Carney  
   - **On:** July 5, 2017  
   - **By:** K. Hart

5. **CITY MANAGER**  
   - **Signed by City Manager on:** July 6, 2017  
   - **Forwarded to:** Clerk  
   - **On:** July 6, 2017  
   - **By:**

6. **CITY CLERK**  
   - **City Clerk attested on:** July 24, 2017  
   - **Returned (1) original(s) to dept. on:** July 24, 2017  
   - **Retained (1) original(s) for City’s file. Hard Copy on file?** Yes ☑  
   - **OB #:**

7. **ORIGINATING DEPARTMENT:**

8. **Requisition No.:**  
   - **Original sent to vendor on:**  
   - **Copy of contract to be retained by department. Original on file in the Clerk’s office.**  
   - **Copy of contract sent to Purchasing on:**  
   - **By:**

9. **PURCHASING: Purchase Order No.:**  
   - **PUR No.:**
ATTACHMENT A

PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AGREEMENT is entered into this 14th day of July 2017, between the CITY OF STOCKTON, a municipal corporation ("City"), and 4LEAF, Inc. a California "C" Corporation whose address is 8896 N. Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Veritas North America, Inc. a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-4200, ("Consultant"), and CSG Consultants, Inc. a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc. a California "S" Corporation whose address is 2400 Camino Ramon Ste. 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

A. Consultant is qualified and experienced in providing on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management for the purposes specified in this Agreement.

B. City finds it necessary and advisable to use the services of the Consultant for the purposes provided in this Agreement.

NOW THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:

1. Consultant’s Services. Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). Consultant shall provide said services at that time, place and in the manner specified in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

2. City Assistance, Facilities, Equipment and Clerical Support. Except as set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), Consultant shall, at its sole cost and expense, furnish all facilities and equipment that may be required for furnishing services pursuant to this Agreement. City shall furnish to Consultant only the facilities and equipment listed in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), according to the terms and conditions set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

COS and 4Leaf, Inc. Professional Services Master Agreement
3. **Term.** Consultant shall perform the scope of work as described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), which is attached to this Contract and incorporated by this reference. This Agreement shall commence on the date written above and shall expire on June 30, 2020, with option for up to two one-year extensions with a 3% annual increase; provided, however the parties may agree to change either the commencement or expiration date.

4. **Compensation.** City shall pay Consultant for services rendered pursuant to this Agreement not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Compensation for services and reimbursable expenses shall be paid in an amount not to exceed Four Hundred Eighty Thousand Dollars ($480,000.00) total across all consultants. CONSULTANT acknowledges that this amount includes total compensation across four contracts.

   a. Invoices submitted by Consultant to City must contain a brief description of work performed, time used and City reference number. Payment shall be made within thirty (30) days of receipt of Consultant's invoice and approved by City.

   b. Upon completion of work and acceptance by City, Consultant shall have sixty (60) days in which to submit final invoicing for payment. An extension may be granted by City upon receiving a written request thirty (30) days in advance of said time limitation. The City shall have no obligation or liability to pay any invoice for work performed which the Consultant fails or neglects to submit within sixty (60) days, or any extension thereof granted by the City, after the work is accepted by the City.

5. **Sufficiency of Consultant's Work.** All reports, drawings, designs, plan review comments and work product of Consultant shall be adequate and sufficient to meet the purposes for which they are prepared.

6. **Ownership of Work.** All reports, drawings, designs, plan review comments, work product, and all other documents completed or partially completed by Consultant in the performance of this Agreement shall become the property of the City. Any and all copyrightable subject matter in all materials is hereby assigned to the City and the Consultant agrees to execute any additional documents that may be necessary to evidence such assignment. All materials shall be delivered to the City upon completion or termination of the work under this Agreement. If any materials are lost, damaged or destroyed before final delivery to the City, the Consultant shall replace them at its own expense. Consultant shall keep materials confidential. Materials shall not be used for purposes other than performance of services under this Agreement and

COS and 4Leaf, Inc. Professional Services Master Agreement
shall not be disclosed to anyone not connected with these services, unless the City provides prior written consent.

7. **Changes.** City may request changes in the scope of services to be provided by Consultant. Any changes and related fees shall be mutually agreed upon between the parties and subject to a written amendment to this Agreement.

8. **Consultant's Status.** In performing the obligations set forth in this Agreement, Consultant shall have the status of an independent contractor and Consultant shall not be considered to be an employee of the City for any purpose. All persons working for or under the direction of Consultant are its agents and employees and are not agents or employees of City.

9. **Termination for Convenience of City.** The City may terminate this Agreement at any time by mailing a notice in writing to Consultant. The Agreement shall then be deemed terminated and no further work shall be performed by Consultant. If the Agreement is so terminated, the Consultant shall be paid for that percentage of the work actually completed at the time the notice of termination is received.

10. **Non-Assignability.** The Consultant shall not assign, sublet, or transfer this Agreement or any interest or obligation in the Agreement without the prior written consent of the City, and then only upon such terms and conditions as City may set forth in writing. Consultant shall be solely responsible for reimbursing subcontractors.

11. **Indemnity and Hold Harmless.** Consultant shall defend, indemnify, and hold harmless, the City and its officers, agents and employees from and against all claims, losses, damage, injury, and liability for damages arising from, or alleged to have arisen from, errors, omissions, negligent or wrongful acts of the Consultant in the performance of its services under this Agreement, regardless of whether the City has reviewed or approved the work or services which has given rise to the claim, loss, damage, injury or liability for damages. This indemnification shall extend for a reasonable period of time after completion of the project as well as during the period of actual performance of services under this Agreement. The City's acceptance of the insurance certificates required under this Agreement does not relieve the Consultant from its obligation under this paragraph.

12. **Insurance.** During the term of this Agreement, Consultant shall maintain in full force and effect at its own cost and expense the insurance coverage as set forth in Exhibit E – Insurance Requirements for Provisions, and shall otherwise comply with the other provisions of Exhibit E.

13. **Notices.** All notices herein required shall be in writing and shall be sent by certified or registered mail, postage prepaid, addressed as follows:

COS and 4Leaf, Inc. Professional Services Master Agreement
Consultant: 4LEAF, Inc.  
Kevin J. Duggan  
8896 North Winding Way  
Fair Oaks, CA 95628

City: City Manager  
City of Stockton  
425 N. El Dorado Street  
Stockton, CA 95202

Bureau Veritas North America  
Craig Baptista  
180 Promenade Ci, Ste. 150  
Sacramento, CA 95834

CSG Consultants, Inc.  
Cyrus Kianpour  
1022 G Street  
Sacramento, CA 95814

West Coast Code Consultants, Inc.  
Giyan Senaratne  
2400 Camino Ramon Ste. 240  
San Ramon, CA 94583

14. Conformance to Applicable Laws. Consultant shall comply with all applicable Federal, State, and Municipal laws, rules, and ordinances. Consultant shall not discriminate in the employment of persons or in the provision of services under this Agreement on the basis of any legally protected classification, including race, color, national origin, ancestry, sex or religion of such person.

15. Licenses, Certifications and Permits. Prior to the City's execution of this Agreement and prior to the Consultant's engaging in any operation or activity set forth in this Agreement, Consultant shall obtain a City of Stockton business license, which must be kept in effect during the term of this Agreement. Consultant covenants that it has obtained all certificates, licenses, permits and the like required to perform the services under this Agreement.

16. Records and Audits. Consultant shall maintain all records regarding this Agreement and the services performed for a period of three years from the date that final payment is made. At any time during normal business hours, the records shall be made available to the City to inspect and audit.

17. Confidentiality. Consultant shall exercise reasonable precautions to prevent the unauthorized disclosure and use of City reports, information or conclusions.

18. Conflicts of Interest. Consultant covenants that other than this Agreement, Consultant has no financial interest with any official, employee or other representative of the City. Consultant and its principals do not have any financial interest in real property, sources of income or investment that would be affected in any
manner of degree by the performance of Consultant's services under this Agreement. If such an interest arises, Consultant will immediately notify the City.

19. **Waiver.** In the event either City or Consultant at any time waive any breach of this Agreement by the other, such waiver shall not constitute a waiver of any other or succeeding breach of this Agreement, whether of the same or of any other covenant, condition or obligation.

20. **Governing Law.** California law shall govern any legal action pursuant to this Agreement with venue for all claims in the Superior Court of the County of San Joaquin, Stockton Branch or, where applicable, in the federal District Court of California, Northern District, Sacramento Division.

21. **No Personal Liability.** No official or employee of City shall be personally liable to Consultant in the event of any default or breach by the City or for any amount due Consultant.

22. **Exhibits.** All exhibits referred to herein are attached hereto and are by this reference incorporated herein.

23. **Scope of Agreement.** This writing constitutes the entire Agreement between the parties. Any modification to the Agreement shall be in writing and signed by both parties.
THIS AGREEMENT executed the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

GENE BARRY - VICE PRESIDENT

KEVIN J. DUGGAN
PRESIDENT

CSG CONSULTANTS, INC.

CYRUS KIANPOUR
PRESIDENT

ATTEST:

BONNIE PAIGE
CITY CLERK

APPROVED AS TO FORM:

Taryn N. Jones
Deputy City Attorney

[If Consultant is a corporation signature(s) must comply with Corporations Code §313.]

COS and 4Leaf, Inc. Professional Services Master Agreement
STATEMENT OF QUALIFICATIONS TO THE
City of Stockton

On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management (PUR 17–001)

APRIL 20, 2017

1022 G Street
Sacramento, CA 95814
916.492.2275 phone
916.492.2276 fax
www.csgengr.com
Table of Contents

SECTION 1    Letter of Introduction
SECTION 2    Firm Experience and Qualifications
SECTION 3    Project Personnel
SECTION 4    Project Experience & References
SECTION 5    Service Plan
SECTION 6    Resumes
This document is formatted for double-sided printing.
Letter of Introduction

April 20, 2017

City Clerk
City of Stockton
425 North El Dorado Street
Stockton, CA 95202

RE: On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management (PUR 17-001)

CSG Consultants, Inc. (CSG) is pleased to present this statement of qualifications to the City of Stockton (City) for on-call as-needed building plan review and inspection, engineering plan review, and floodplain management services for a three-year term, with up to two one-year extensions.

We understand the City is seeking firms to provide as-needed, on-call consulting services for variety of specialty services. Our firm brings specialized expertise, knowledgeable, and experienced staff. CSG can readily provide these services with the employees identified in this proposal, and no subconsultants will be utilized. Many of our proposed staff members are cross-trained in multiple service levels, providing our clients with increased efficiency as well as the ability to provide on-call staffing depending upon the City’s fluctuating needs.

CSG currently furnishes building and safety, public works, planning, fire prevention, code enforcement and other municipal services to over 160 clients. We perform work solely for public agencies, eliminating the potential for conflicts of interest. In this way, we can focus exclusively on the specific needs of our municipal clients. We have a solutions-oriented approach to our work, leveraging our team’s depth and breadth of experience and technical expertise to rectify issues for our clients. CSG has provided on-call consulting services to public agencies throughout the State of California. A sampling of communities for which we provide similar services include:

- City of Lincoln
- City of Patterson
- County of Sacramento
- City of Roseville
- County of Placer
- City Tracy

We can be available for meetings at City Offices when requested. Bob Latz, CBO will serve as the primary point of contact for this contract, all communication will be directed to him. His contact information is as follows:

Bob Latz | Regional Manager
device (209) 304-4603 | bobl@csgengr.com

CSG is currently providing building plan review, fire plan review and inspection, staff augmentation, and engineering design services, and has recently provided floodplain management services to the City.

We are excited about the opportunity to continue serving the City of Stockton. If you have any questions or need additional information, please contact Mr. Latz at the information provided above.

Sincerely,

[Signature]

Cyrus Kianpour, PE, PLS
President, CSG Consultants, Inc.
Bob Latz  
CBO  
Regional Manager

Mr. Latz serves as Regional Manager for CSG Consultants. In this capacity, he provides governmental management support for building administration, building inspection, plan review, fire services, code enforcement, public works, and planning. Mr. Latz brings over 23 years of experience in the municipal field.

Mr. Latz has experience serving in both the public and private sector. He is currently serving as the Deputy Director/Building Official of Community Development in the City of Stockton. Mr. Latz previously served as the Building Official for the Cities of Citrus Heights, Folsom, and Oakdale where he was responsible for overseeing the entire building department in each city. His responsibilities included managing the day-to-day operations of the building departments, including plan review, permit issuance, building inspection services and code enforcement. He was also instrumental in budget preparations for the departments, ensuring all local and state ordinances and codes were met, as well as managing personnel issues. In addition, Mr. Latz served as President of the Board of Directors for the California Building Officials Association and is the Chairman and a valued instructor for the CALBO Training Institute. Mr. Latz was recognized as the 2014 California Fire Chiefs Association Fire Prevention Officers Building Official of the Year.

LICENSES and CERTIFICATIONS
Certified Building Official  
Certified Building Inspector  
Certified Electrical Inspector  
Certified Mechanical Inspector  
Certified Plumbing Inspector  
Certified Combination Inspector  
Certified Access/Plans Examiner  
CA Commercial Building Inspector  
CA Residential Building Inspector  
CA Commercial Electrical Inspector  
CA Residential Electrical Inspector  
CA Commercial Mechanical Inspector  
CA Residential Mechanical Inspector  
CA Commercial Plumbing Inspector  
CA Residential Plumbing Inspector  
CA Commercial Combination Inspector  
CA Residential Combination Inspector  
| 0869074  
| Safety Assessment Program  
| SAPC 50349

EDUCATION
Certificate of Achievement, Building Technology  
Butte College | Oroville, CA

PROFESSIONAL AFFILIATIONS
Building Official of the Year Award | California Fire Protection, Buellton, CA  
CALBO Board of Directors, Past President  
CALBO Training Institute  
| Chairman and Instructor  
Sacramento Valley Association of Building Officials  
| Past President  
International Code Council  
California Building Officials  
CALBO Disaster Response Team Member  
California Association of Code Enforcement  
Western Pacific League of Building Officials, Past President
Firm Information and Qualifications

CSG Consultants, Inc. (CSG) is a California company with our local office in Sacramento, approximately 50 miles from City Hall, and its corporate office in Foster City. Additional support is available from our other offices in Pleasanton, San Jose, Newman, and Orange. Founded in 1991, CSG performs work solely for public agencies, eliminating the potential for conflicts of interest between developers and the City. In this way, we can focus exclusively on the specific needs of our municipal clients.

CSG provides a wide range of services to community development and public works departments, often serving as a seamless extension of City staff. The majority of the 260+ individuals within our firm have provided public agency services throughout their entire careers. Our talented personnel having held similar positions with communities facing the same development issues as the City of Stockton bring a wealth of ideas, experience, and solutions.

NAME OF FIRM: CSG Consultants, Inc.

PROJECT CONTACT: Bob Latz, CBO | Regional Manager

LOCAL OFFICE: 1022 G Street, Sacramento, CA 95814
(916) 492-2275 phone, (916) 492-2276 fax
www.csgengr.com • info@csgengr.com

REGIONAL OFFICES: 550 Pilgrim, Foster City, CA 94404
3150 Almaden Expressway, Suite 255, San Jose, CA
6200 Stoneridge Mall Road, Suite 300, Pleasanton, CA 94588
930 Fresno Street, Newman, CA 95360
3707 West Garden Grove Blvd, #100, Orange, CA 92868

YEARS IN BUSINESS: 26 • Founded in 1991
EMPLOYEES: 260+

TYPE OF BUSINESS: California Corporation • Incorporated June 15, 2000 • Federal ID: 91-2053749

STAFF COMPOSITION

Our professional municipal services staff consists of:

- Building Inspectors
- Building Plan Reviewers
- Fire Plan Reviewers & Inspectors
- Certified Floodplain Managers
- Program & Project Managers
- Planning Professionals
- CASp Professionals
- Structural Engineers
- Transportation Engineers
- Civil Engineers
- Construction Managers & Inspectors
- Plan and Map Review Engineers
MUNICIPAL SERVICES

Our services and project experience include the following areas of expertise:

**BUILDING & FIRE LIFE SAFETY**
- Building Department Administration
- Building Plan Review and Inspection
- Fire Plan Review and Inspection
- Structural Plan Review
- OSHA/OSHA Review
- CASp Assessment and Inspection
- Public Facilities Assessment
- LEED/Green Building Services
- Code Compliance/Enforcement
- Staff Augmentation

**PLANNING & SUSTAINABILITY**
- Staff Augmentation for Current and Advance Planning
- Project Management Including Plan Amendments
- CEQA Environmental Review
- Energy Efficiency, Water Conservation, Solid Waste Program Development
- AB 32 Compliance/Climate Action Plan Development and Implementation
- Greenhouse Gas Reduction Strategies
- Grant Writing and Grant Management

**INFORMATION TECHNOLOGY**
- GreenVue Software
- Digital Plan Review
- Electronic Archiving
- Web-Based Construction Management
- Asset Management
- Project Management
- GIS and IT Support

**PUBLIC WORKS ENGINEERING & DESIGN**
- Capital Improvement Project Design:
  - Transportation/Roadway, Water and Sewer Utilities, Traffic Engineering
  - Development Review, Plan Check, Surveying and Mapping, Storm Water Program Compliance (NPDES, QSP/QSD)

**CIP PROJECT & PROGRAM MANAGEMENT**
- Capital Improvement Program Development and Implementation
- Federal and State Grant Administration
- Rule 20A Undergrounding
- Staff Augmentation Including: Design Consultant Coordination, Project Scoping, RFP Preparation

**CONSTRUCTION MANAGEMENT & INSPECTION**
- Contract Administration, Including:
  - Resident Engineer Oversight, Inspection and Construction Management
  - Constructability/Bidability Reviews
  - Cost and Schedule Control
  - Claims Avoidance

FINANCIAL STABILITY & INSURANCE REQUIREMENTS

CSG is privately held and just celebrated its 25-year anniversary. CSG has an existing relationship with the City of Stockton and provided over $340,000 of services in calendar year 2016. CSG is financially sound with outside lines of credit available to support its operations and ample capability to deliver the proposed services. Reviewed consolidated financial statements can be provided separately, if requested.

CSG currently meets the insurance requirements as indicated in Exhibit A of the Request for Qualifications. CSG’s current coverage amounts are provided in the following table.

<table>
<thead>
<tr>
<th>COVERAGE</th>
<th>Limits of Liability</th>
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</thead>
<tbody>
<tr>
<td>WORKERS COMPENSATION</td>
<td>Statutory</td>
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<tr>
<td>COMMERCIAL GENERAL LIABILITY</td>
<td>$1,000,000 Each Occurrence</td>
</tr>
<tr>
<td></td>
<td>$1,000,000 Personal &amp; Advertising Injury</td>
</tr>
<tr>
<td></td>
<td>$2,000,000 General Aggregate</td>
</tr>
<tr>
<td>AUTOMOBILE LIABILITY</td>
<td>$1,000,000 Combined Single Limit</td>
</tr>
<tr>
<td>PROFESSIONAL LIABILITY</td>
<td>$5,000,000 Each Claim</td>
</tr>
</tbody>
</table>
Project Personnel

ORGANIZATIONAL STRUCTURE

CSG proposes the following staff and organizational structure for this project. **Bob Latz, CBO** will serve as the single point of contact for the City and will allocate appropriate levels of resources to this contract and will ensure that plan review work is comprehensive and thorough and meets the City's deadlines. Resumes of proposed staff are provided in Section 6 of this proposal. **No subconsultants will be used on this contract.**

**CITY OF STOCKTON**

**Bob Latz, CBO**
Project Manager

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### ON-CALL BUILDING PLAN REVIEW

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yvonne Christopher</td>
<td>Senior Plans Reviewer</td>
</tr>
<tr>
<td>Steve May</td>
<td>Senior Plans Reviewer</td>
</tr>
<tr>
<td>Ruby Vicencio, EIT</td>
<td>Building Plans Reviewer</td>
</tr>
<tr>
<td>Mike Brinkman, CASp, CBO, MCP</td>
<td>Senior Plans Reviewer</td>
</tr>
<tr>
<td>Michael Luomis, SE, CBO, CASp, LEED AP</td>
<td>Structural Plans Review Engineer</td>
</tr>
<tr>
<td>Bounmy Soumountha, SE, CBO</td>
<td>Structural Plans Review Engineer</td>
</tr>
<tr>
<td>Sayaka Yamane, PE, CBO, LEED AP, CBO</td>
<td>Plan Review Engineer</td>
</tr>
<tr>
<td>Phiroze Wadia, SE, LEED AP</td>
<td>Structural Plans Review Engineer</td>
</tr>
<tr>
<td>Shweta Prakash, PE, CBO</td>
<td>Plan Review Engineer</td>
</tr>
<tr>
<td>Samuel Tan, PE</td>
<td>Plan Review Engineer</td>
</tr>
<tr>
<td>David Nesbit, PE</td>
<td>Plan Review Engineer</td>
</tr>
<tr>
<td>Fazarn Tondnevis, PE</td>
<td>Plan Review Engineer</td>
</tr>
<tr>
<td>Rajesh Vangala, CBO, CASp</td>
<td>Building Plans Reviewer</td>
</tr>
<tr>
<td>Kit Wong</td>
<td>Building Plans Reviewer</td>
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</tbody>
</table>

### ON-CALL BUILDING INSPECTION

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dan DeBarba</td>
<td>Senior Building Inspector</td>
</tr>
<tr>
<td>Jim Anders</td>
<td>Senior Building Inspector</td>
</tr>
<tr>
<td>Dennis Edwards</td>
<td>Senior Building Inspector</td>
</tr>
<tr>
<td>William Scott Andrews</td>
<td>Building Inspector</td>
</tr>
<tr>
<td>Mike Brinkman, CASp, CBO, MCP</td>
<td>Senior Inspector</td>
</tr>
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### ON-CALL ENGINEERING PLAN

<table>
<thead>
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<th>Name</th>
<th>Position</th>
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</thead>
<tbody>
<tr>
<td>Frank Navarro, PE, QSD/P, CFM</td>
<td>Principal Engineer</td>
</tr>
<tr>
<td>Eric Gonzalez, PE</td>
<td>Senior Engineer</td>
</tr>
<tr>
<td>Mehdi Sharifi, PE, LEED AP</td>
<td>Senior Engineer</td>
</tr>
<tr>
<td>Babak Kaderi</td>
<td>Associate Engineer</td>
</tr>
<tr>
<td>Michelle Bocakan, EIT</td>
<td>Associate Engineer</td>
</tr>
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### ON-CALL FLOODPLAIN MANAGEMENT

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<th>Name</th>
<th>Position</th>
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</thead>
<tbody>
<tr>
<td>Frank Navarro, PE, QSD/P, CFM</td>
<td>Principal Engineer</td>
</tr>
<tr>
<td>Babak Kaderi</td>
<td>Associate Engineer</td>
</tr>
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</table>

### ON-CALL PERMIT TECHNICIAN

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susan Blas</td>
<td>Permit Technician</td>
</tr>
<tr>
<td>Tiffanie Redmon</td>
<td>Permit Technician</td>
</tr>
</tbody>
</table>
STAFF QUALIFICATIONS

We take pride in providing personnel who have variety of project experiences, who are motivated to achieve the highest level of certification, and who have the personality and customer service skills that are crucial to on-the-job success. All CSG staff are certified and/or possess additional required certifications.

The table below illustrates the breadth and depth of personnel available for this contract.

<table>
<thead>
<tr>
<th>Name</th>
<th>Qualifications</th>
<th>License/Certifications</th>
<th>Office Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elizabeth GDB</td>
<td>Certified Building Official, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td>Manager</td>
<td>Certified Building Inspector, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Certified Electrical Inspector, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Certified Mechanical Inspector, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Certified Plumbing Inspector, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Certified Combination Inspector, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Certified Access Point Examiner, ICC Certified</td>
<td>D028587</td>
<td>Sacramento</td>
</tr>
<tr>
<td></td>
<td>Commercial Building Inspector, ICC Certified</td>
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<td>Residential Building Inspector, ICC Certified</td>
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<td></td>
<td>Commercial Electrical Inspector, ICC Certified</td>
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<td></td>
<td>Commercial Mechanical Inspector, ICC Certified</td>
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<td>Residential Mechanical Inspector, ICC Certified</td>
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City of Stockton
Statement of Qualifications for PUR17-001
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<tr>
<td>Michael Loomia, SE, PE, CBO, CASp, LEED AP</td>
<td>Professional Engineer Civil Engineer, State of California</td>
<td>56787</td>
<td>Foster City</td>
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<tr>
<td></td>
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<td>Certified CAL Green Plans Examiner, ICC Certified</td>
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<tr>
<td>Boumy Sosomthara, SE, CBO Building Official, Structural Plans Review Engineer</td>
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<td>34213</td>
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<td>Phiroze Wadia, SE, LEED AP Structural Plan Review Engineer</td>
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<td>Shweta Prakash, PE Plan Review Engineer</td>
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<td>Sayaka Yamane, PE, LEED AP, CBO Plan Review Engineer</td>
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<td>Rajesh Vangala, CBO Building Plans Reviewer</td>
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<td>Kit Wong, Building Plans Reviewer</td>
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<td>Frank Navarro, PE, QSDP, CFM Principal Engineer</td>
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<td>Mehdi Sharifi, PE, LEED AP Senior Engineer</td>
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| Benson Keaton, Associate Engineer   | Fire Protection and Emergency Management Training  
                                        | Traffic Control Technician and Traffic Control Inspector Certification  
                                        | 1st Try  
                                        | Competency Certification  
                                        | Competency Certification in Fire Protection  
                                        | Competency Certification in Water Quality Protection  
                                        | Competency Certification in Construction  
                                        | Pleasonton                      |
| Michelle Bussiere, ETI               | Engineer in Training                                                           |                       | Pleasonton       |
| Dan Russell                         | Certified Building Inspector, ICC Certified                                    | 6736538-02             | Sacramento       |
| Bennett Russell                      | Certified Building Inspector, ICC Certified                                    | 6736538-26             | Sacramento       |
| John Andersen, ICC                   | Certified Building Inspector, ICC Certified                                    | 9716625               | Sacramento       |
| Joseph Anderson, ICC                 | Certified Building Inspector, ICC Certified                                    | 9716625               | Sacramento       |
| Joseph Anderson                      | Certified Plumbing Inspector, ICC Certified                                     | 9708237               | Sacramento       |
| Joseph Anderson                      | Certified Mechanical Inspector, ICC Certified                                    | 9708237               | Sacramento       |
| Joseph Anderson                      | Certified Electrical Inspector, ICC Certified                                    | 9708237               | Sacramento       |
| Joseph Anderson                      | Certified Combination Inspector, ICC Certified                                   | 9708237               | Sacramento       |
| William (Scott) Andrews, Building Inspector | Contractor's State License Certificates  
                                                       | CSL 13861              | Sacramento       |
| Susan Ellis                          | Certified Building Inspector, ICC Certified                                     | 1115554               | Sacramento       |
| Perrin McKee                         | Certified Plumbing Inspector, ICC Certified                                     |                       | Sacramento       |
| Terrike Redmond                      | Certified Electrical Inspector, ICC Certified                                    |                       | Sacramento       |
COMMITMENT TO EXCELLENCE

We encourage staff to participate in and contribute to the many associations important to our industry. Knowing technical excellence and proficiency is vital to successful public service, attending update seminars, specialized training classes and continuing certification conferences is an integral part of delivering “best-in-the-business” service to our clients. Many of our staff hold or have held key positions within the groups listed below as well as serve as in-demand instructors and trainers.

- League of California Cities
- California Building Officials
- International Code Council
- ICC Chapters of Sacramento Valley, Napa-Solano, Shasta Cascade, Monterey, Yosemite, Central Coast, Peninsula, East Bay, Los Angeles Basin, Coachella, Orange Empire, Foothill, Redwood Empire
- County Building Officials Association of California
- California Fire Chiefs Association
- Northern California Fire Prevention Officers
- Southern California Fire Prevention Officers
- National Fire Protection Association
- California Automatic Fire Alarm Association
- American Fire Sprinkler Association
- National Fire Sprinkler Association
- American Public Works Association
- Institute of Transportation Engineers
- Structural Engineers Association of Northern California
- Structural Engineers Association of Southern California
- Certified Access Specialist Institute (CASI)
This document is formatted for double-sided printing.
Project Experience & References

PROJECT EXPERIENCE

CSG's main function is to serve as an extension of the public agencies for which we work. We clearly understand the importance of our role in the success of our clients' communities and commit to providing their citizens and business partners—residents, architects, engineers, developers, contractors—as well as agency staff, the highest level of service. We believe effective communication and excellent customer service are essential to continuing successful working relationships between our clients, CSG, and the development community.

The following are examples of commercial and residential projects for which CSG has performed similar services as those requested by the City

Summerset Assisted Living | City of Lincoln, CA
Building & Fire Plan Review and Fire Inspection
CSG performed building & fire plan review and fire inspection services for this Summerset Assisted Living and Memory Care project. The 142,494 sq. ft., 66 unit memory care facility will house 719 occupants. The 90,820 sq. ft., 114 unit, three story assisted living facility will have the ability to house 952 occupants. The project is type VA, fully sprinklered.

Quartz Ridge Apartments | County of Placer, CA
Building Plan Review and Inspection
CSG performed a complete building review and inspection for Quartz Ridge Apartments. This project has 64 units comprised of eight buildings totaling 61,528 sq. ft. The units are two story type VB. The project also has a 1,633 sq. ft. one story, type VB clubhouse with community swimming pool located on 6.15 acres.

Verizon Wireless Data Center | County of Placer, CA
Building Plan Review and Inspection
CSG performed a complete building plan review and inspection of a two story structure with 118,710 sq. ft. total of infrastructure, administration and data center space. NEC I is a total of 75,834 sq. ft. and includes infrastructure and administration areas on the first floor, and data center space and additional administration areas on the second floor. Building construction is braced steel frame with an architectural precast panel skin. The project is located on a 5 acre site.

Anton Arcade Apartments | County of Sacramento, CA
Building Plan Review
CSG performed a building plan review for Anton Arcade Apartments which include four buildings consisting of 148 units for a total of 128,889 sq. ft. The four apartment buildings (buildings A-D) are three story on grade type VA construction. Building B includes tuck under parking garages. The project also includes a one story type VB 4,178 sq. ft. community center.

Avila at Fiddyment Ranch Apartments | City of Roseville, CA
Building & Fire Plan Review
CSG performed a complete building and fire plan review of a 34,513 sq. ft., 300 unit project consisting of 75 one bedroom, 165 two bedroom and 60 three bedroom units. The project will have 14 tuck-under parking garages. The project includes a club house, pool, tot lot, BBQ/shade structure, and associated site improvements.
Taylor Morrison at Fiddyment Ranch | City of Roseville, CA
Building Plan Review

CGS performed a building plan review for Taylor Morrison Master Plans Parker at Fiddyment Ranch. These master plans feature 4 single-family detached home designs ranging in size from 2,476-3,931 sq. ft. Plans include both single and two-story plans, and multiple room options. These homes are wood framed type V-B construction.

Genentech Development | City of South San Francisco, CA
Building Plan Review and Inspection Services

CSG has been providing building plan review and inspection services for all of the Genentech corporate headquarters campus buildings since 1991. This campus-wide project consists of over 3.6 million sq. ft. of office, research & development and manufacturer operations space spread across over 44 buildings. CSG has coordinated pre-construction meetings to clarify and resolve all matters prior to plan submittal; provided building plan review services and 24/7 on-call building inspection services; and coordinated and resolved construction issues between the City, project engineer, Genentech project manager and special inspector(s). Notable recent projects include:

- Campus wide refrigeration water and hydrocarbon upgrade
- Building 34 – New four story employee center totaling 71,672 sq.ft.
- Building 35 – New seven story office building, totaling 255,000 sq.ft.

Apple Campus 2 Tantau Development | City of Cupertino, CA
Building Plan Review

CSG provided on and off site plan review for multiple new structures as part of the Apple Campus 2 Tantau Development. Review included foundation, shell, and tenant improvements for seven new structures. CSG assisted architects and engineers for code inquiries and clarifications, provided expedited review of RFIs, and coordinated with City departments to ensure review and approval of submittals. The total project size was 1.3 million sq. ft. Examples of buildings for which CSG provided review include:

- New four-story, 410,000 sq. ft. building consisting of office, restaurant and below grade parking.
- 2 new two-story buildings for testing facilities totaling 212,000 sq. ft.
- New five-story, 304,000 sq. ft. parking structure, data center and energy center
- New 206,000 sq. ft. visitor center
- New 3,300 sq. ft. Tantau reception building
- New 1,870 sq. ft. Wolfe reception building
- 2 new outdoor open air cafeterias at 2,586 sq. ft. each
- New Maintenance building at 2,238 sq. ft.

Glen Loma Ranch | City of Gilroy, CA
Engineering Plan Review

CSG is providing full engineering plan check and map review for this 360 acre development, which will include 1600 units of varying size and residencies, divided into 19 residential neighborhoods, a new fire station, town center commercial area, preserved open space, and major bicycle and pedestrian system. CSG staff is currently reviewing Phase 1A of this project which includes 3 subdivision improvement plans with a total of 274 units, two roundabouts, and a city park.
Fort Ord Development | City of Marina, CA
Building & Fire Plan Review, Fire Inspection, and Engineering Plan Review Services

CSG is currently providing comprehensive building and engineering plan check for the development of 420 acres of former Fort Ord property that lies within the boundaries of the City of Marina. The project, for which a Specific Plan was developed, consists of mixed use (retail, entertainment, commercial, and live/work), regional retail, low-income housing, office/research/light industrial, and residential areas. The development also includes numerous public parks and a multi-modal corridor. Specific project examples include:

The Promontory

CSG provided comprehensive building plan review for this 174-unit student housing apartment complex adjacent to the CSU Monterey Bay campus. Construction consisted of three new 4-story apartment buildings (including a 1-story clubhouse within an apartment building). The 270,000 sq. ft. project had a construction cost of $28.9 million.

Imjin Office Park

5 acre LEED certified civic center office site for Marina Coast Water District, Fort Ord Reuse Authority offices, Carpenters Union Local 605, and Bureau of Land Management.

Cinemark Theater

10 screen movie theater complex.

Veterans Affairs Outpatient Clinic

CSG provided complete building and fire plan review for this integrated Department of Veterans Affairs and Department of Defense joint health-care clinic, the first in California. This new 146,000 sq. ft., three-story structure on 14.3 acres will serve as a state-of-the-art medical clinic. The facility will provide primary and specialty care to including subspecialty clinics, audiology, indoor and outdoor physical therapy, occupational therapy, a mental health center, and imaging and laboratory space. This project achieved LEED Gold certification per the LEED for Healthcare 2009 Edition.

Atria at Foster Square | City of Foster City, CA
Building Plan Review and Development Review

CSG performed building plan review and development review for this mixed-use (57,501 sf residential and 10,560 sf commercial) development featuring specialty retail, recreation and age-qualified housing options. Specifically, the building contains 66 units of senior rental apartments housed in three floors over one floor of lobby, community, mechanical and retail spaces. The upper three levels are type V-A wood framed over the one story of type A-1 concrete podium.
REFERENCES

Our track record of success with our clients is outstanding and we encourage you to contact our references with any questions or clarification you might require. The following is a partial list of regional references for which CSG has provided similar services as those requested by the City.

**City of Stockton**
David Kwong
Community Development Director
345 N. El Dorado Street
Stockton, CA 95202
(209) 937-8842
David.kwong@stocktongov.com

*Building and Fire Plan Review and Inspection, and Permit Technician Services*
2013—Ongoing

**City of Lincoln**
Gary Eide
Chief Building Official
600 Sixth Street
Lincoln, CA 95648
gary.eide@lincolnca.gov
(916) 434-2483

*Building & Fire Plan Review and Inspection Services*
2013—Ongoing

**City of Roseville**
Scott Byrnes
Chief Building Inspector
311 Vernon Street
Roseville, CA 95678
(916) 744-5338
sbyrnes@roseville.ca.us

*Building and Fire Plan Review, and Permit Technician Services*
2007—Ongoing

**County of Sacramento**
Robert Logsdon
Interim Chief Building Official
827 7th Street
Sacramento, CA 95814
(916) 875-5296
logsdonr@saccounty.net

*Building Plan Review and Inspection*
2014—Ongoing

**County of Placer**
Tim Wegner
Building Official
3091 County Center Drive, Suite 160
Auburn, CA 95603
(530) 745-3125
twegner@placer.ca.gov

*Building and Fire Plan Review and Inspection Services*
2010—Ongoing

**Jackson Rancheria**
Larry White
Community Development Director
12222 New York Ranch Road
Jackson, CA 95642
(209) 283-0264
L.white@jacksoncasino.com

*Building Official, Building and Fire Plan Review and Inspection Services*
2007—Ongoing
PROVEN APPROACH TO WORK

CSG’s proposed team has been identified to best support the City of Stockton and will deliver the highest level of service through its application of technical expertise, knowledge of municipal processes and procedures, efficient and effective customer care, and application of code compliance combined with innovative solutions and helpful alternatives. Our extensive experience in furnishing comprehensive building and fire life safety services to jurisdictions provides a consistent, strong technical foundation to all projects. From cutting edge digital plan review and online plan check status reporting to providing faster-than-scheduled turnaround times, CSG will deliver the highest quality services to the City of Stockton.

Key benefits that we offer include:

- **Concentrated focus on cost-saving approaches and methods.** Because we serve many municipalities and agencies, we are constantly improving and adapting to provide our clients with the most cost-effective services. We share a wealth of recommendations from our varied experience with other communities to help keep our clients’ budgets on-track.

- **Customized, responsive services.** We are skilled at assessing time commitments, developing an accurate work plan and applying dedicated, professional personnel. We can quickly fine-tune staffing levels to match or adjust to changes in plan review, inspection and front counter activity—always maintaining the highest level of customer service. We hand pick staff uniquely qualified and experienced to deliver the exact services requested.

- **Fully committed and qualified personnel.** We maintain staff fully licensed and certified at the highest level of industry standards. To keep our personnel on the industry’s cutting edge, many serve as popular educational instructors and lecturers as well as sit on leading boards and committees for organizations developing and implementing important code regulations. We also keep up with latest in procedures and use of products, e.g., green building, accessibility, CSGp certification requirements, NPDES, MRP, and more.

- **Swift turnarounds and expedited services.** With extensive experience in the digital plan review process, our staff excels at providing rapid turnaround times. We easily match and more often beat any required turnaround deadlines.

- **Leading-edge technology with cost-saving solutions.** CSG delivers a suite of digital options for jurisdictions—speedy digital plan reviews including electronic versions of plan comments, an optional, easy-to-use online web application/portal for submittal, tracking and approval of digital plans; and available full scanning and archival services.

- **Environmentally friendly practices.** Our corporate policy on sustainability supports a healthy environment, reduces our carbon footprint, and promotes environmental stewardship through environmentally preferable purchasing and other sustainability actions. Our digital plan review system encourages the bypass of paper use, and all possible documents at CSG are printed double-sided on recycled, post-consumer content paper.
BUILDING PLAN REVIEW SERVICES

Compliance Standards
Our team of professionals is ready to assist in all aspects of plan review and to focus on the special needs and requirements of each of our clients. We pledge prompt turnaround times and offer comprehensive online status reports. Our plan reviewers carefully review all documents for compliance with building codes, fire codes, energy conservation standards, State accessibility regulations, and all local ordinances. We understand and will comply with the City’s own requirements for plan review services. Our engineers and plan reviewers review plans for compliance with all policy and model codes adopted by the State of California and local jurisdiction, including but not limited to:

- California Building Code, Volumes 1 and 2
- California Residential Code
- California Electrical Code
- California Plumbing Code
- California Mechanical Code
- California Fire Code as amended and adopted by the State of California (Title-24, Part 9 California Fire Code)
- National Fire Codes as published by the National Fire Protection Association (NFPA); as adopted and referenced by the State of California (California Code of Regulations, Title-19, Section 1.09)
- State Historical Building Code
- California Energy Code
- California Green Building Code
- NPDES/WQMP/SWPPP Compliance:
- Local adopted ordinances and amendments relative to building, fire and municipal codes, including project Conditions of Approval from other agency departments, divisions, regulating agencies, and jurisdictions.

CASp Review Services
We understand California Building Departments are required to have CAsp certified staff in place and available for technical questions and interpretations. Our CAsp certified staff members are knowledgeable of state and federal accessibility laws and regulations and possess the expertise necessary to promote access to facilities for persons with disabilities. In accordance with current regulations, CSG can supply a CAsp certified professional to review plans for accessibility and to facilitate compliance with regulations.

OSHPD 3 Reviews
Our staff of professional engineers and certified plans examiners is experienced with the differences between CBC and OSHPD 3 facilities and have successfully completed OSHPD 3 plan reviews for multiple client agencies. CSG can also provide certified OSHPD Inspectors of Record for a variety of different projects upon request.

Green Building and LEED Certification
Our Building Division staff is experienced in plan review and inspection for compliance with CALGreen, LEED equivalency, and local green building ordinances. In addition, CSG Consultants has all of the qualifications necessary to assist the City in both the development of policy and the implementation of green and sustainable building practices. CSG’s Sustainability Programs division can assist, for example, with construction and demolition debris recycling programs as well as public outreach to the building industry. We have Certified Green Building Professionals (CGBP) and LEED-accredited personnel on staff.
Digital Plan Check

CSG began the transition to digital plan review over 12 years ago, leading the consultant field with this ground-breaking service. All paper plans submitted to CSG are immediately scanned into digital files and stored on CSG’s servers for quick and easy access by both our clients and our plan reviewers. Our plan reviewers furnish electronic versions of their plan comments conforming to each client’s established correction list templates. Any additional forms utilized by the City for alternative methods of construction and/or deviations from requirements, such as disabled access, will be incorporated into the correction comments and returned with the appropriate recommendations. Plan check comments can be delivered electronically by email or other City approved means, enabling City staff to immediately modify CSG’s checklist for incorporation with other department comments. Upon request, clients can be provided with a set of digitally scanned plans at no cost, including convenient, “green” (paperless) storage of all construction-related documents.

In addition, for jurisdictions requesting a pure digital plan review workflow, CSG has developed an online web application for an applicant to submit digital files directly to us, which includes an online portal for the applicant/jurisdiction to retrieve comments and submitted digital files with marked up plans including redlines. This online portal tracks all submittals, including re-submittals until the plans have been approved.

Key features of our digital plan review service include:

- **Efficiency.** Plans are pushed to plan review staff the same day they are submitted. There is no “bin time.”
- **Simplicity.** CSG developed its own web-based portal to manage the electronic file submittal process.
  - By using a web interface, the applicant is no longer faced with size restrictions on email attachments or required to learn complex FTP settings.
- **Proven.** We have provided a digital plan review option to our clients for over 12 years.
- **Non-Proprietary.** CSG’s electronic review process is 100% PDF-based with no additional software required to view redlines.
- **Growth.** Should the City decide to implement electronic review as a standard, CSG offers an integration path for our electronic review software—GreenVue Fusion.

Online Plan Check Status

CSG offers a convenient service allowing clients to check plan review status and comments online. By logging in to our Plan Check Status website, staff as well as authorized applicants can view each project document and communicate with the plan checker via e-mail or electronic post-a-note. Staff or authorized applicants can download comments from the web upon completion of the plan check. There is no additional cost for this service.

Plans Pickup and Delivery

CSG will arrange for pickup and delivery of plans from/to City offices. The pickup and delivery of plans and other materials via CSG staff or an approved alternative service is provided at no additional cost.

Plan Check Turnaround Times

CSG works hard to provide the best quality and most timely service in the industry. We pride ourselves in maintaining the requested plan review times for all our clients—even delivering faster than our own deadlines. Our goal is to approve code-complying projects and to successfully and quickly move work through jurisdictional processes. CSG will ensure that all building and safety duties and follow-up actions will be performed in a timely and responsive manner. The following are CSG’s proposed plan check turnaround times.
<table>
<thead>
<tr>
<th>TYPE OF REVIEW</th>
<th>INITIAL REVIEW (BUSINESS DAYS)</th>
<th>RE-CHECK (BUSINESS DAYS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential New Construction</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Residential Additions</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Small Residential Remodels</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Non-Residential / Commercial New Construction*</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Commercial Additions</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Small Commercial Remodels / Tenant Improvements</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Large/Complex Commercial Projects*</td>
<td>15</td>
<td>10</td>
</tr>
</tbody>
</table>

*Turnaround time may vary with the complexity and magnitude of the project. If a review is anticipated to take longer than the maximum turnaround timing, CSG will notify the City’s representative and negotiate additional time required to ensure an appropriate level of review.

Expedited Plan Check

CSG completes initial accelerated plan check within 5 working days. Rechecks are completed in less time. At your request, we can perform plan check services within an accelerated time frame; with fees negotiated between the City, and CSG.

Quality Control/Quality Assurance

CSG's in-house quality assurance/quality control program utilizes a peer review process with multi-level internal plan checking and project management. A senior staff member will review all plan check comments in order to ensure relevance and accuracy.

BUILDING INSPECTION SERVICES

Standards and Responsibilities

CSG provides fully integrated, multi-disciplined building and fire inspection services for residential, commercial, and industrial projects, and are experienced in all construction types. We provide experienced, ICC certified (and/or with other appropriate entities in accordance with AB717) inspectors.

Our inspectors ensure compliance with applicable codes and requirements by identifying code violations, offering solutions to developers, property owners and tenants on potential risks and safety hazards, and by working as a team to correct violations. Specific responsibilities include but are not limited to the following:

- Providing inspection services for project compliance with relevant codes, including accessibility, fire, grading, building, electrical, mechanical and plumbing
- Addressing inquiries and resolving complaints
- Assisting with the construction and demolition permitting process
- Providing code administration, Inspection and enforcement
- Maintaining records and files concerning construction permits and building code administration, documents for storage and/or imaging

In addition, we can utilize inspection personnel whenever possible to perform over-the-counter plan check or assist as customer service back-up at the front counter in addition to regular inspection duties to save jurisdictions valuable time and expenses. Our inspection staff easily integrates into client organizations, consistently implementing policies and procedures and remaining transparent to applicants and customers.

CSG provides all vehicles, fuel, maintenance and other equipment necessary for inspectors to carry out duties with no additional cost to the City.
Continuing Certification and Training

We take pride in working with inspectors who have variety of inspection project experiences and who are motivated to achieve the highest level of certification. We work hard to match your jurisdiction's level of safety and code compliance and understand that personality and customer service are crucial to on-the-job success. All CSG inspectors are ICC certified and/or possess additional required certifications. In addition, they routinely update their knowledge and skills through attendance of specialized training classes and seminars in approved and modern methods, materials, tools and safety used in building inspection, as well as the most current building standards.

CASp Inspection Services

To facilitate the County’s compliance with current rules and regulations, CSG can provide a CASp certified professional for technical questions and interpretations, and to perform accessibility compliance inspections.

PERMIT TECHNICIAN SERVICES

CSG has highly qualified staff available to provide Permit Technician, Planning Technician and Development Review Technician services. These frontline, first response services are vital to the success of the entire building and safety permit process as they often set the tone for the applicant whether a homeowner, contractor, or architect. CSG handpicks exceptionally qualified personnel with a central focus on operating as an extension of the agency’s team, understanding the importance of exemplary customer service, knowledge of the inner-workings of building departments, and thorough familiarity with the building application and permit process.

CSG's permit processing staff is trained in customer service and helping to expedite the permit process. Our staff members are able to perform quick assessments of each customer's needs and ensure that they are properly served. Our staff is knowledgeable and experienced with permit processing functions including:

- Providing the public with appropriate forms and handouts
- Creating permit applications and issuing permits using the County's software
- Accepting plans, specifications, structural calculations and energy reports for plan check
- Routing plans for Plans Examiners to plan check
- Preparing plan check letters to be sent to applicants
- Assisting the public with completing applications and other required forms
- Providing copies of documents when authorized

Our permit technicians maintain orderly working environments, including folding or rolling plans, maintaining file integrity, and logging documents in-and-out in an organized manner. They are familiar with State Contractors License Law and ensure that permits are issued to properly licensed contractors. They are also familiar with multiple permit software systems and will quickly gain proficiency with software that has been customized for a particular agency.

AVAILABILITY AND CUSTOMER SERVICE

CSG's main function is to serve as an extension of the City of Stockton. We clearly understand the importance of our role in the success of the City and commit to providing its citizens and business partners—residents, architects, engineers, developers, contractors—as well as City staff, the highest level of service. We believe effective communication and excellent customer service are essential to continuing a successful working relationship between the City, CSG, and the development community.
Office Hours and Meeting Availability

CSG staff plan checkers are available for applicant inquiries or conferences anytime during regular business hours without charge via telephone, 8:00 AM to 5:00 PM, Monday through Friday. CSG Inspectors can be ready to provide services with 24 hours notice. We can easily alter our hours to meet the City’s needs. Evenings and weekends for special events and meetings can be accommodated with 48 hours notice. For your convenience, we can also meet with City staff, architects and applicants. We recognize the value of pre-design consultation with prospective applicants and are available to provide this service as well. Our Project Manager/Lead will be available in person for consultation and meetings with a reasonable lead time.

Response to City Questions or Requests

CSG staff can typically respond to the City for all questions or requests generated during field inspections or any plan review during the same day, but no later than the following day a request is received.

Emergency Response

CSG is well qualified to respond to a local or regional emergency. Many of our personnel, have assisted in emergencies such as the recent San Bruno gas explosion, the Northridge, and Loma Prieta earthquake as well as regional floods, fires and other emergencies. Our personnel’s certifications include those obtained through FEMA, Office of Emergency Services (OES), and IACET First Responder.

ENGINEERING PLAN CHECK SERVICES

Drawing on the combined experience and talent of our staff, we have found the following practices helpful in approaching development review, and plan review. The exact Scope of Work will be determined based on our discussion with the City and the type of project.

New Development Entitlements:

- Review tentative maps, tentative parcel maps, architectural review, and other entitlement applications. Coordinate review with other City staff and/or outside agencies as needed.
- Attend follow-up meetings with Planning staff, the applicant, or others as needed to resolve issues regarding the proposal. Review subsequent submittals of the proposal.
- Assist the City with development of conditions of approval, development agreements, and other requirements associated with development applications. Assist City in negotiating with developers regarding terms of agreements or conditions (Additional tasks associated with the entitlement process are described above).

Plan Review and Map Review

- Review final maps, Improvement, and landscape plans. Review includes evaluation of required records, studies, grading and improvement plan, and additional materials submitted by the design professional. Confirm that plans conform to City standard design criteria, conditions of approval, and infrastructure or other master plans.
- Each plan review will be accompanied with a letter summarizing the red-line comments addressed to the applicant’s engineer or landscape architect, with a copy to City staff and the applicant. A complete red-lined set of drawings and any reports will be returned to the design professionals for use in their corrections. At the applicant’s discretion, the comment summary letter and red-lined plan sheets can be scanned and submitted electronically to the design consultant to expedite the review process.
- The consultant will meet with the applicant/representative and City staff to review comments or to delineate the standards which are not being met, in order to facilitate timely completion of the review and meeting the maximum goal of two plan checks. CSG will accept and review subsequent submittals electronically, when feasible, in order to expedite the review process.
Soils reports will be evaluated and confirmation of recommendations will be included on the plans. Boundary conditions will be evaluated to maintain continuity with surrounding properties and maintain existing drainage patterns.

Construction erosion control and post-construction water quality control will be evaluated for compliance with the storm water quality management permit in effect for the City.

Assist the City with development of conditions of approval, development agreements, and other requirements associated with development applications. Assist City in negotiating with developers regarding terms of agreements or conditions (Additional tasks associated with the entitlement process are described above).

Confirm that the developer has obtained necessary permits or approvals from other public agencies as needed. and that plans conform to the City’s NPDES Municipal Regional Permit requirements for storm water treatment and retention.

Review and recommend approval of engineering bond estimates and subdivision guarantees. Assist the staff in preparing subdivision improvement agreements, other agreements (including stormwater treatment measure and landscape maintenance agreements), and staff reports.

Meet with developers, consultants, and other agencies on behalf of staff, as requested.

Staffing

- All plan reviews will be conducted by a State of California licensed civil engineer or under the supervision of a licensed civil engineer.
- Each plan review is assigned to a plan reviewer with oversight of the project manager. The assigned design plan reviewer will be committed to the project and will furnish all subsequent reviews for the project. It is the goal of CSG Consultants to provide, where practical, a cradle-to-grave approach for project review, where a review team is assigned to the project from entitlement through plan review and construction to closeout and acceptance.
- Provide specialized qualified licensed engineers to assist in any structural, soil and geotechnical reviews, for any of the assigned projects.
- Map checking will be overseen by licensed professional land surveyors or by professional engineers licensed to practice land surveying in the State of California.
- The review team will be available for applicant inquiries or conferences during normal business hours, Monday through Friday, from 8:00 AM through 5:00 PM. Web conferences, fax, and conference calls are optional forms of communications between Consultant and City staff.

Plan Check Time Lines

- Consultant shall achieve quality plan review while maintaining consistently superior turnaround times. Consultant shall perform plan review within the following time lines: stated in working days, upon receipt of complete application package: fifteen (15) days for initial plan checks and ten (10) days for re-checks/back checks. CSG can provide electronic review of plan revisions submitted in response to prior comments, in order to expedite the review process.
- It is understood that more complex projects may require additional time. It is the responsibility of Consultant to immediately inform the City that the plan review may vary from the proposed time lines.

Accelerated Plan Review

- If required by the City, Consultant has the ability to perform plan review services within an accelerated time frame, negotiated on behalf of the applicant, the City’s appointed contact, and Consultant. In most cases, Consultant will complete initial plan review in fewer than ten working days (five working days for re-checks). However, it is understood that some plans may require additional time. In those instances, Consultant shall notify and receive approval by the City of Stockton of the expected processing time prior to performing the plan review.
Online Plan Check Status

- Consultant shall make available online services to enable City and authorized applicants to determine the status of plan checks. There is no additional cost for this service.

Typical Plan Review Schedule

- Development of hard-and-fast schedules for completion of development review and plan review work is difficult as timing and scope of projects is not always known. Examples of time frames for completing certain tasks are provided below.

<table>
<thead>
<tr>
<th>TYPE</th>
<th>TIME FRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-application entitlement review, PRC review</td>
<td>Review application material in advance of requested meetings; complete formal comments and submit to Planning within one week of meeting</td>
</tr>
<tr>
<td>Review Tentative Map Application or Other Entitlement Package</td>
<td>Fifteen (15) working days of notice of submittal by City</td>
</tr>
<tr>
<td>Prepare Conditions of Approval</td>
<td>Prepare within one week of request by Planning, or within reasonable shorter time frame if needed to meet hearing date</td>
</tr>
<tr>
<td>Complete Improvement Plan or Map Review (1st Check)</td>
<td>Fifteen (15) working days of notice of submittal by City</td>
</tr>
<tr>
<td>Prepare fee estimate, review bond estimate, or prepare permit</td>
<td>Ten (10) working days of request</td>
</tr>
<tr>
<td>Review request for right-of-way vacation</td>
<td>Ten (10) working days of notice of submittal by City</td>
</tr>
<tr>
<td>Review Lot Line Adjustment/ Lot Merger</td>
<td>Ten (10) working days of notice of submittal by City</td>
</tr>
<tr>
<td>Miscellaneous Assignments</td>
<td>Dependent on scope, typically within five (5) working days</td>
</tr>
</tbody>
</table>

Turnaround times include pickup, QA/QC, and delivery to City.

CSG will attempt to reduce the need for formal resubmittals to the City by reviewing electronic submittals of revisions provided directly to CSG. Turnaround times would vary based on the scope of the review, but would typically be returned within one to two working days.
COST PROPOSAL TO THE

City of Stockton

FOR

On-Call Building Plan Review and Inspection Services, Engineering Plan Review, and Floodplain Management (PUR 17-001)

PREPARED BY

CSG Consultants, Inc.

April 20, 2017
Professional Services Fees

CSG’s fee schedule for proposed work is provided in the table below. All plan review services will be performed at CSG’s office. CSG will coordinate the pickup and return of all plans to CSG via staff or a licensed courier service. This service is provided at no additional cost.

Plan review based on a percentage of the City’s plan check fee includes initial plan review and two subsequent reviews. Additional reviews will be charged at the appropriate hourly rate indicated below.

**FEE SCHEDULE**

<table>
<thead>
<tr>
<th>SERVICE / ROLE</th>
<th>FEE / HOURLY RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Plan Review by Percentage</td>
<td>65% of City’s Building Plan Check Fees</td>
</tr>
<tr>
<td>Expedited Plan Review by Percentage</td>
<td>95% of City’s Building Plan Check Fees</td>
</tr>
<tr>
<td>Structural Engineer</td>
<td>$150</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$185</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$125</td>
</tr>
<tr>
<td>Building Official</td>
<td>$125</td>
</tr>
<tr>
<td>Building Plan Reviewer</td>
<td>$85</td>
</tr>
<tr>
<td>Fire Plan Reviewer</td>
<td>$95</td>
</tr>
<tr>
<td>CASp Plan Reviewer/Inspector</td>
<td>$125</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review/Certification</td>
<td>$110</td>
</tr>
<tr>
<td>Certified Flood Plain Manager</td>
<td>$200</td>
</tr>
<tr>
<td>Combination Inspection</td>
<td>$85</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$60</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>NA</td>
</tr>
</tbody>
</table>

All hourly rates include overhead costs including, but not limited to, salaries, benefits, Workers Compensation Insurance, and office expenses. Should the scope of work change or circumstances develop which necessitate special handling, we will notify the City prior to proceeding. Annual adjustments may be made by mutual agreement based upon current CPI. CSG will mail an invoice at the beginning of every month for services rendered during the previous month.
Resolution No. 2017-06-20-1103

STOCKTON CITY COUNCIL

RESOLUTION AUTHORIZING THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

Development is cyclical, and during an improving economy the demand for building plan review and inspection services can outpace staffing levels; and

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods; and

On March 29, 2017, a Request For Qualifications (RFQ) for development related Building Plan Check, Inspection and Engineering on-call services was posted to the City’s Bid Flash web page in order to develop a pool of qualified firms (PUR 17-001); and

RFQs were reviewed by an evaluation panel consisting of three CDD staff and selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service and total hourly cost rate to the City; and

Four out of the five firms were recommended for the pool as follows: 4LEAF, Inc. Fair Oaks, CA; CSG Consultants, Inc., Sacramento, CA; Bureau Veritas North America, Inc., Sacramento, CA; and West Coast Code Consultants, Inc., San Ramon, CA; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. The "Professional Services Master Agreement," attached hereto as Exhibit 2 and incorporated by this reference, between the City of Stockton and each of the following firms is hereby authorized and approved for the establishment of a Vendor Pool:

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

Firm qualifications, staffing plans, and standard hourly rates schedules are found in Exhibit 1, which is also attached and incorporated by this reference.
2. The City Manager is hereby authorized and directed to execute the Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.

3. The City Manager is hereby authorized to enter into amendments to the Professional Services Master Agreement with each of the firms in the vendor pool in a total amount not to exceed $480,000 across all vendors.

4. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED _______ June 20, 2017 _______.

ATTEST:

[Signature]

MICHAEL D. TUBBS
Mayor of the City of Stockton

[Signature]

BONNIE PAIGE
City Clerk of the City of Stockton
AUTHORIZE THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

It is recommended that the City Council adopt a resolution to authorize the City Manager to:

1. execute a Professional Services Master Agreement with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. execute amendments to the Professional Services Master Agreement for individual projects in an amount not to exceed $480,000 across the entire vendor pool; and

3. authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the resolution.

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. The Community Development Department (CDD) is completing multi-year forecasts and staffing to the lowest estimated need in the upcoming years. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as specialized staff availability for unique or very complicated projects.

Therefore, staff recommends Council adopt a resolution to authorize the City Manager to execute a Professional Services Master Agreement with four professional firms as detailed above for an initial three-year term with an option to extend the agreement for
up to two additional one-year periods. Costs associated with the Professional Services Master Agreement are covered by fees collected from each project applicant before plan reviews or inspections are conducted. Compensation under the proposed agreement is limited to a cumulative amount of $480,000 for all vendors.

DISCUSSION

Background

As part of the current fiscal year budget development and adoption, a combination of modest staffing increases and use of consulting services was determined to be the most responsible way to address increasing development activity and increased demand for Building Division activities such as plan check (building, engineering, and backup fire plan check), inspection, counter staffing and flood plain management. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring permanent specialist staff.

There has been a rapid increase in development project valuation in the City of Stockton over the last several years as the market continued an upward trend that resulted in increased planning and building permit activity and economic growth. Below, by fiscal year, are building permit valuations for recent fiscal years:

- FY 2012-13: $121 million
- FY 2013-14: $141 million
- FY 2014-15: $215 million
- FY 2015-16: $315 million
- FY 2016-17: $275 million (Projected)

Permit valuation has largely increased due to the volume, type, and complexity of projects as the economy improves. Although projected valuation for FY 2016-17 is expected to dip from that of FY 2015-16, valuations remain robust. Therefore, the CDD plans to continue to utilize consultants to provide the necessary flexibility to respond to cyclical demand, assist when full-time staff shortages occur, and provide specialized knowledge or training when required.

This affords the department the ability to quickly change the scale and scope of staffing support levels to correspond to workload needs at any time while maintaining high levels of customer service. Fees are collected from the applicant before any plan review, or inspection services are performed. Maintaining a pool of multiple firms provides the department the flexibility to select the appropriate consultant based on the specific project-related work and the availability of staff.

The CDD currently maintains two contracts for on-call services (building inspectors and plan checkers, permit technicians, licensed engineers, and certified building officials). Under the existing contracts 4LEAF invoices to date are $281,688.23 and CSG invoices
to date are $260,858.13 (69% expended). Each firm was used based on ability to provide qualified, experienced staff at the time of the City's request. These contracts were originally approved in Fiscal Year (FY) 2015-16 for two years and expire on June 30, 2017. Due to an improving economy and the tightening of the labor pool in specialized building services, having a Professional Services Master Agreement with four consultants will allow the City to provide a better spectrum of services and enable the department to respond to short-term increases in building activity, staff vacancies, and adhere to established timelines, policies, and legal requirements.

Present Situation

On March 29, 2017, a Request For Qualifications (RFQ) was posted to the City's Bid Flash web page. Five RFQ submittals were received on April 20, 2017, from the following vendors:

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- EsGIl Corporation, a SAFEbuilt Company, Loveland, CO
- West Coast Code Consultants, Inc., San Ramon, CA

An evaluation panel consisting of three CDD staff reviewed the submissions and recommended four out of the five. The selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service, and the total hourly rate cost to the City. The pool of consultants will provide additional coverage for City service demands, and to allow a larger pool of selected consultants the opportunity to complete City work.

The Professional Services Master Agreement will apply to all four firms for services over a three (3) year period, on an as-needed basis, with the total aggregate compensation paid to all four firms not to exceed $480,000 (Exhibit 2 to the Resolution - Professional Services Master Agreement). Each selected firm's statement of qualifications, proposed staffing, and standard rate schedule for services, are included in Exhibit 1 to the Resolution.

Once the Master Agreement is in place, firms can be selected from the pool to perform work specific to each project. Project specific scope of work and fees for professional services will be submitted from the selected firms. Final scope of work and fees will be adopted via an amendment to the Professional Services Master Agreement on a project-by-project basis.

This level of contract capacity will allow the department to adjust resources as necessary to provide high quality, timely work. The CDD continues to implement process improvements while monitoring workload and demand to ensure that full-time and contract staffing levels are appropriately balanced, re-evaluating these needs
annually. Authorizing the City Manager to execute the Professional Services Master Agreement, and establish the pool will allow the CDD to continue to meet service delivery goals in an efficient, timely, and professional manner.

FINANCIAL SUMMARY

Funding for the Professional Services Master Agreement is included in the proposed FY 2017-18 budget for $320,000. The remaining portion of $160,000 is expected to be appropriated in the FY 2018-19 fiscal year budget and funded from the same account.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Code</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2017-18:</td>
<td>048-1830-530.20-66</td>
<td>$320,000</td>
</tr>
<tr>
<td>FY 2018-19:</td>
<td>048-1830-530.20-66</td>
<td>$160,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>$480,000</td>
</tr>
</tbody>
</table>
Insurance Requirements for Professional Services

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

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

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

2. **Automobile Liability**: Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than $1,000,000 per accident for bodily injury and property damage.

3. **Workers’ Compensation** insurance as required by the State of California, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than $1,000,000 per accident for bodily injury or disease. *(Not required if consultant provides written verification it has no employees)*

4. **Professional Liability (Errors and Omissions)** Insurance appropriate to the Consultant’s profession, with limit no less than $2,000,000 per occurrence or claim, $2,000,000 aggregate. *(If Claims-made, see below.)*

If the Consultant maintains higher limits than the minimums shown above, the City of Stockton requires and shall be entitled to coverage for the higher limits maintained by the consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City of Stockton.

Other Insurance Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status
The City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers are to be covered as additional insureds on the CGL policy and AL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).

**Primary Coverage**
For any claims related to this contract, the **Consultant's insurance coverage shall be endorsed as primary** insurance as respects the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers. Any insurance or self-insurance maintained by the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers shall be excess of the Consultant's insurance and shall not contribute with it. The City of Stockton does not accept endorsements limiting the Consultant's insurance coverage to the sole negligence of the Named Insured.

**Notice of Cancellation**
Each insurance policy required above shall state that **coverage shall not be canceled, except with notice to the City of Stockton.**

**Waiver of Subrogation**
Consultant hereby grants to City of Stockton a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City of Stockton by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City of Stockton has received a waiver of subrogation endorsement from the insurer.

**Deductibles and Self-Insured Retentions**
Any deductibles or self-insured retentions must be declared to and approved by the City of Stockton Risk Services. The City of Stockton may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

**Acceptability of Insurers**
Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A-VII if admitted to do business in the State of California; if not admitted to do business in the State of California, insurance is to be placed with insurers with a current A.M. Best's rating of no less than A+:X.
Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

2. If Claims Made policy form is used, a three (3) year discovery and reporting tail period of coverage is required after completion of work.

Verification of Coverage
Consultant shall furnish the City of Stockton with original certificates and amendatory endorsements required by this clause. All certificates and endorsements are to be received and approved by the City of Stockton Risk Services before work commences. Failure to obtain the required documents prior to the work beginning shall not waive the Consultant’s obligation to provide them. The City of Stockton reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time, for any reason or no reason.

Consultant shall, prior to the commencement of work under this Agreement, provide the City of Stockton with a copy of its Declarations Page and Endorsement Page for each of the required policies.

Certificate Holder Address
Proper address for mailing certificates, endorsements and notices shall be:

- City of Stockton
- Attention: Risk Services
- 425 N El Dorado Street
- Stockton, CA 95202

City of Stockton Risk Services Phone: 209-937-5037
City of Stockton Risk Services Fax: 209-937-8558

Maintenance of Insurance
If at any time during the life of the Contract or any extension, the Consultant fails to maintain the required insurance in full force and effect, all work under the Contract shall be discontinued immediately. Any failure to maintain the required insurance shall be sufficient cause for the CITY to terminate this Contract.

Subcontractors
Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City of Stockton is an additional insured on insurance required from subcontractors.
**Special Risks or Circumstances**

City of Stockton reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.
MEMORANDUM

June 26, 2017

TO: Kurt O. Wilson, City Manager

FROM: David Kwong, Director

SUBJECT: PROFESSIONAL SERVICES MASTER TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES

On June 20, 2017 the above item was approved by City Council by resolution number 17-06-20-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document(s).

DAVID KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DK:mm

Attachments
ATTACHMENT A

CONTRACT ROUTING FORM

Contract Number: 2017-DIE-20-1103-02 NP

(For Clerk's Use)

CONTRACT TYPE (select one)
- Original
- Amendment/Renewal/Change Order
- Grant
- Subdivision Agreement
- Other

CONTRACT INFORMATION
- Contract Amount: $480,000
- Contract Title: Professional Services Master Agreement to establish vendor pool for on-call Building Plan Check, et al.
- Vendor/Other Party: 4LEAF, Bureau Veritas, CSG Consultants, West Coast Code Consultants (WC3)
- Contract Start Date: July 10, 2017
- Contract End Date: June 30, 2020
- Contract Term: 3-Yrs (2) 1-year ext.

COUNCIL APPROVAL REQUIRED? ☑ Yes ☐ No
- (provide account # if no)
- Council approval required for contracts over $75,000 for FISCAL YEAR: 2017-18
- Motion/Resolution/Ordinance No: 17-06-20-1103 Must be Attached ☑

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):
- Business License Required? ☑ Yes ☐ No
- Business License No: 4LEAF 18 00076218 BV 18 00127671
- Bonds Required? ☑ Yes ☐ No
- Bonds Required: CSG 18 00114727 WC3 18 00127495
- Insurance Required? ☑ Yes ☐ No
- Notary Required? ☑ Yes ☐ No
- Recodertion Required? ☑ Yes ☐ No

Routing Order

1. DEPARTMENT: CDD
   - DEPARTMENT HEAD APPROVAL: [Signature] date: 6/16/17
   - Project Mgr: Mark Martin ext: 8544 Staff Jobi Adams ext: 8564
   - Forwarded to: Raaann Cyenias on: 6/26/2017 by: Mark Martin

2. VENDOR/OTHER PARTY
   - Signed (2) originals on: 6/16/17
   - Forwarded to: MARK MARTIN on: 6/16/17 by: BUREAU VERITAS

3. RISK SERVICES
   - Insurance approved on: 7-5-17 by: 2013 Bonds approved on: — by:
   - Forwarded to: Lori Asuncion FJONES on: 7/15/17 by: M MARTIN RM #: 17-207

4. CITY ATTORNEY
   - Approved as to Form and Content on: 7/10/17 by:
   - Forwarded to: Scott Carney on: 7-15-17 by:

5. CITY MANAGER
   - Signed by City Manager on: 8/19/17 Forwarded to: Clerk on: 7/19/17 by:

6. CITY CLERK
   - City Clerk attested on: 7-24-17 Returned (1) original(s) to dept. on: 7-24-17 by
   - Retained (1) original(s) for City's file. Hard Copy on file? Yes ☑ No ☐ OB #

7. ORIGINATING DEPARTMENT:
   - Requisition No. Original sent to vendor on:
   - Copy of contract to be retained by department. Original on file in the Clerk's office.
   - Copy of contract sent to Purchasing on:

8. PURCHASING: Purchase Order No. PUR No.
PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AGREEMENT is entered into this 17 day of July 2017, between the CITY OF STOCKTON, a municipal corporation ("City") and 4LEAF, Inc. a California "C" Corporation whose address is 8896 N. Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and BUREAU VERITAS NORTH AMERICA, INC. a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-4200, ("Consultant"), and CSG CONSULTANTS, INC. a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and WEST COAST CODE CONSULTANTS, INC. a California "S" Corporation whose address is 2400 Camino Ramon Ste. 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

A. Consultant is qualified and experienced in providing on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management for the purposes specified in this Agreement.

B. City finds it necessary and advisable to use the services of the Consultant for the purposes provided in this Agreement.

NOW THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:

1. Consultant's Services. Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). Consultant shall provide said services at that time, place and in the manner specified in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

2. City Assistance, Facilities, Equipment and Clerical Support. Except as set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), Consultant shall, at its sole cost and expense, furnish all facilities and equipment that may be required for furnishing services pursuant to this Agreement. City shall furnish to Consultant only the facilities and equipment listed in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), according to the terms and conditions set forth in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.).

COS and 4Leaf, Inc. Professional Services Master Agreement
3. **Term.** Consultant shall perform the scope of work as described in in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.), which is attached to this Contract and incorporated by this reference. This Agreement shall commence on the date written above and shall expire on June 30, 2020, with option for up to two one-year extensions with a 3% annual increase; provided, however the parties may agree to change either the commencement or expiration date.

4. **Compensation.** City shall pay Consultant for services rendered pursuant to this Agreement not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Compensation for services and reimbursable expenses shall be paid in an amount not to exceed Four Hundred Eighty Thousand Dollars ($480,000.00) total across all consultants. CONSULTANT acknowledges that this amount includes total compensation across four contracts.

   a. Invoices submitted by Consultant to City must contain a brief description of work performed, time used and City reference number. Payment shall be made within thirty (30) days of receipt of Consultant’s invoice and approved by City.

   b. Upon completion of work and acceptance by City, Consultant shall have sixty (60) days in which to submit final invoicing for payment. An extension may be granted by City upon receiving a written request thirty (30) days in advance of said time limitation. The City shall have no obligation or liability to pay any invoice for work performed which the Consultant fails or neglects to submit within sixty (60) days, or any extension thereof granted by the City, after the work is accepted by the City.

5. **Sufficiency of Consultant’s Work.** All reports, drawings, designs, plan review comments and work product of Consultant shall be adequate and sufficient to meet the purposes for which they are prepared.

6. **Ownership of Work.** All reports, drawings, designs, plan review comments, work product, and all other documents completed or partially completed by Consultant in the performance of this Agreement shall become the property of the City. Any and all copyrightable subject matter in all materials is hereby assigned to the City and the Consultant agrees to execute any additional documents that may be necessary to evidence such assignment. All materials shall be delivered to the City upon completion or termination of the work under this Agreement. If any materials are lost, damaged or destroyed before final delivery to the City, the Consultant shall replace them at its own expense. Consultant shall keep materials confidential. Materials shall not be used for purposes other than performance of services under this Agreement and
shall not be disclosed to anyone not connected with these services, unless the City provides prior written consent.

7. **Changes.** City may request changes in the scope of services to be provided by Consultant. Any changes and related fees shall be mutually agreed upon between the parties and subject to a written amendment to this Agreement.

8. **Consultant’s Status.** In performing the obligations set forth in this Agreement, Consultant shall have the status of an independent contractor and Consultant shall not be considered to be an employee of the City for any purpose. All persons working for or under the direction of Consultant are its agents and employees and are not agents or employees of City.

9. **Termination for Convenience of City.** The City may terminate this Agreement at any time by mailing a notice in writing to Consultant. The Agreement shall then be deemed terminated and no further work shall be performed by Consultant. If the Agreement is so terminated, the Consultant shall be paid for that percentage of the work actually completed at the time the notice of termination is received.

10. **Non-Assignability.** The Consultant shall not assign, sublet, or transfer this Agreement or any interest or obligation in the Agreement without the prior written consent of the City, and then only upon such terms and conditions as City may set forth in writing. Consultant shall be solely responsible for reimbursing subcontractors.

11. **Indemnity and Hold Harmless.** Consultant shall defend, indemnify, and hold harmless the City and its officers, agents and employees from and against all claims, losses, damage, injury, and liability for damages arising from, or alleged to have arisen from, errors, omissions, negligent or wrongful acts of the Consultant in the performance of its services under this Agreement, regardless of whether the City has reviewed or approved the work or services which has given rise to the claim, loss, damage, injury or liability for damages. This indemnification shall extend for a reasonable period of time after completion of the project as well as during the period of actual performance of services under this Agreement. The City’s acceptance of the insurance certificates required under this Agreement does not relieve the Consultant from its obligation under this paragraph.

12. **Insurance.** During the term of this Agreement, Consultant shall maintain in full force and effect at its own cost and expense the insurance coverage as set forth in Exhibit E – Insurance Requirements for Provisions, and shall otherwise comply with the other provisions of Exhibit E.

13. **Notices.** All notices herein required shall be in writing and shall be sent by certified or registered mail, postage prepaid, addressed as follows:

COS and 4Leaf, Inc. Professional Services Master Agreement
Consultant: 4LEAF, Inc.  
Kevin J. Duggan  
8896 North Winding Way  
Fair Oaks, CA 95628

City: City Manager  
City of Stockton  
425 N. El Dorado Street  
Stockton, CA 95202

Bureau Veritas North America  
Craig Baptista  
180 Promenade CI, Ste. 150  
Sacramento, CA 95834

CSG Consultants, Inc.  
Cyrus Kianpour  
1022 G Street  
Sacramento, CA 95814

West Coast Code Consultants, Inc.  
Giyan Senaratne  
2400 Camino Ramon Ste. 240  
San Ramon, CA 94583

14. **Conformance to Applicable Laws.** Consultant shall comply with all applicable Federal, State, and Municipal laws, rules, and ordinances. Consultant shall not discriminate in the employment of persons or in the provision of services under this Agreement on the basis of any legally protected classification, including race, color, national origin, ancestry, sex or religion of such person.

15. **Licenses, Certifications and Permits.** Prior to the City’s execution of this Agreement and prior to the Consultant’s engaging in any operation or activity set forth in this Agreement, Consultant shall obtain a City of Stockton business license, which must be kept in effect during the term of this Agreement. Consultant covenants that it has obtained all certificates, licenses, permits and the like required to perform the services under this Agreement.

16. **Records and Audits.** Consultant shall maintain all records regarding this Agreement and the services performed for a period of three years from the date that final payment is made. At any time during normal business hours, the records shall be made available to the City to inspect and audit.

17. **Confidentiality.** Consultant shall exercise reasonable precautions to prevent the unauthorized disclosure and use of City reports, information or conclusions.

18. **Conflicts of Interest.** Consultant covenants that other than this Agreement, Consultant has no financial interest with any official, employee or other representative of the City. Consultant and its principals do not have any financial interest in real property, sources of income or investment that would be affected in any
manner of degree by the performance of Consultant's services under this Agreement. If such an interest arises, Consultant will immediately notify the City.

19. **Waiver.** In the event either City or Consultant at any time waive any breach of this Agreement by the other, such waiver shall not constitute a waiver of any other or succeeding breach of this Agreement, whether of the same or of any other covenant, condition or obligation.

20. **Governing Law.** California law shall govern any legal action pursuant to this Agreement with venue for all claims in the Superior Court of the County of San Joaquin, Stockton Branch or, where applicable, in the federal District Court of California, Northern District, Sacramento Division.

21. **No Personal Liability.** No official or employee of City shall be personally liable to Consultant in the event of any default or breach by the City or for any amount due Consultant.

22. **Exhibits.** All exhibits referred to herein are attached hereto and are by this reference incorporated herein.

23. **Scope of Agreement.** This writing constitutes the entire Agreement between the parties. Any modification to the Agreement shall be in writing and signed by both parties.
THIS AGREEMENT executed the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

GENE BARRY - VICE PRESIDENT
KEVIN J. DUGGAN
PRESIDENT

CSG CONSULTANTS, INC.

CYRUS KIANPOUR
PRESIDENT

ATTEST:

BONNIE PAIGE
CITY CLERK

APPROVED AS TO FORM:

Taryn N. Jones
Deputy City Attorney

[If Consultant is a corporation signature(s) must comply with Corporations Code §313.]

COS and 4Leaf, Inc. Professional Services Master Agreement
STATEMENT OF QUALIFICATIONS
FOR ON-CALL BUILDING PLAN REVIEW AND INSPECTION SERVICES, ENGINEERING PLAN REVIEW
RFP NUMBER PUR 17-001

PREPARED FOR THE:
CITY OF STOCKTON

CONTACT INFO

Michael Renner
916.794.6222
MikeR@wc-3.com
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  Resumes

Under Separate Cover

Professional Services Fees
LETTER OF INTRODUCTION

Tracy LaBarber
Community Development
City of Stockton
425 North El Dorado Street
Stockton, CA 95202-1997

RE: REQUEST FOR QUALIFICATIONS FOR ON-CALL BUILDING, INSPECTION, ENGINEERING & CONSTRUCTION MANAGEMENT SERVICES

West Coast Code Consultants, Inc. (WC³) is pleased to present our proposal. We understand the City of Stockton is requesting assistance with on-call building, inspection, engineering & construction management services. Our team of highly qualified staff and track record of outstanding service to our clients makes our firm ideally suited to provide the services requested. We are an established firm and bring experience in all construction types with successful projects completed for over 300 jurisdictions and agencies.

Our scope of services, work plan, compensation, background and years of experience, staff qualifications, a sampling of various projects, and terms of agreement are all presented within our proposal. Our key strategies are as follows:

- Perform quality plan reviews that meet or beat the required turnaround times.
- Furnish accurate and responsive plan reviews to ensure compliance with all current codes and the City of Stockton Municipal code.
- Provide all services in a cost-effective manner.
- Provide the highest level of customer service for internal and external customers.
- Balance the need to ensure conformance to standards and regulations with the need for predictability, uniformity, and efficiency.

We propose Mr. Michael Renner as our Project Manager and main point of contact for our Sacramento office located at 3841 N. Freeway Blvd., Suite 280. He can be reached at 916.794.6222 or miker@wc-3. Mr. Renner’s resume can be found in the appendix. I will remain available at any time should the City of Stockton require additional support. I am authorized to contractually bind WC³. In addition, should you have any questions or require further information, please do not hesitate to contact me at (925) 766-5600 or giyan@wc-3.com. Thank you for considering WC³ for your building and safety services. We look forward to working with you and your staff, and are confident in our ability to deliver outstanding service and technical excellence for the City of Stockton.

Sincerely,
West Coast Code Consultants, Inc.

Giyan A. Senaratna, PE, SE, LEED AP, CASp
Principal/CEO
2400 Camino Ramon, Suite 240 | San Ramon, CA 94583
T: 925.275.1700 or C: 925.766.5600
giyan@wc-3.com | www.wc-3.com
FIRM INFORMATION

Firm Information & Qualification

Below is a listing of our locations and contact information. We can serve your community by providing Building and Safety Plan Review and Inspection, Public Works Plan Review and Inspection, Fire Prevention Plan Review and Inspection, Code Enforcement Services, Engineering & Planning Services, Construction Management, CASp Plan Review & Inspections and Electronic Document Management Solutions.

Principal:

Giyen Senaratne, PE, SE, LEED AP, CASp
Principal/CEO
925.275.1700 O | 925.766.5600 C
giyen@wc-3.com

Regional Manager / Principal Office:

Michael Renner, CBO
3841 N Freeway Blvd, Suite 280
Sacramento, CA 95834
916.332.1503 O | 916.794.6222 C
miker@wc-3.com

YEAR ESTABLISHED: 2006 | Over 10 years in Business | California S Corporation | Federal ID: 204707579

EMPLOYEE COUNT: 108

LOCATION: WC3 Sacramento regional office is located a short 50 miles from the City of Stockton's offices allowing for a speedy response to any of your potential needs.

Office Locations:

CORPORATE OFFICE
2400 Camino Ramon, Suite #240
San Ramon, CA 94583
Phone: 925.275.1700

SOUTH SAN FRANCISCO OFFICE
417 Grand Avenue, Suite 201
South San Francisco, CA 94080
Phone: 650.794.6353

SACRAMENTO OFFICE:
3841 N Freeway Blvd, Suite 280
Sacramento, CA 95834
Phone: 916.332.1503

WASHINGTON OFFICE:
1910 36th Avenue W, Suite 207
Lynnwood, WA 98036
Phone: 425.582.1719

WEST JORDAN, UTAH OFFICE:
951 S. REDWOOD RD, SUITE A
WEST JORDAN, UTAH 84088
PHONE: 801.547.8133

Layton, Utah Office:
958 West Gordon Ave, Suite #3
Layton, UT 84041
Phone: 801.547.8133

West Coast Code Consultants, Inc.
Background and History

West Coast Code Consultants, Inc. (WC) specializes in providing all inclusive municipal consulting services to jurisdictions and government entities. WC was founded in 2006 by Giyan Senaratne, P.E., S.E., LEED AP, CASp. Since that time our goal has been the harmonious and efficient integration of our services with public agencies. Our staff of over 100 employees is comprised of structural engineers, civil engineers, electrical engineers, mechanical engineers, fire protection engineers, ICC certified building officials, certified access specialists (CASp), ICC certified plans examiners, ICC certified building inspectors, ICC certified permit technicians and other professionals.

No Conflict of Interest

WC works only for government agencies and has no conflict of interest with any applicants applying for permits or requiring inspections by your jurisdiction. WC has no past, ongoing, or potential conflicts of interest which would occur due to executing work with your jurisdiction.

Insurance

West Coast Code Consultants, Inc. carries ample insurance to comply with the City’s requirements. WC is familiar with the insurance requirements included in Exhibit A of the RFP. Upon the award of the contract the insurance policy will be provided to the City.
SCOPE OF SERVICES

Building Plan Review

WC3 will provide the following scope of building plan review services by performing plan reviews at our Sacramento office or, if requested, at the City's Building Department. Plans will be carefully reviewed for their compliance with the model codes adopted by the State of California as amended by the City of Stockton. We have read and will comply with the specifics set forward within the Request for Proposal. Plans are thoroughly reviewed for the following (as applicable):

- 2016 California Building Code Volume 1 & 2
- 2016 California Residential Code
- Title-24 Accessibility
- 2016 California Electrical Code
- 2016 California Green Building Code
- 2016 California Plumbing Code
- 2016 California Energy Code
- 2016 California Mechanical Code
- 2016 Historical Building Code
- OSHPD - 3
- City of Stockton ordinances

Our structural plan review staff is experienced in reviewing new and retrofit projects utilizing wood, masonry, reinforced concrete, pre-stressed concrete, structural steel, and light gauge steel construction. We have reviewed projects using the following codes, standards, and criteria:

- ASCE 7-10, 31 and 41
- NEHRP
- FEMA 350, 351, 353, and P-751
- AISC 341-10, 358-10, and 360-10
- ACI 318-11
- ANSI/AF&PA NDS-08
- TMS 402-11 / ACI 530-11
- AISI S100 to S230-07

To provide our clients with comprehensive plan review services our plans examiners are well versed in California Title 24 Energy and Accessibility requirements. Additionally, because sustainable design is one of the current goals in the construction industry, our review team has experience with the requirements of the California Historical Building Code, California Green Building Standards Code, LEED, and other green building standards.
SCOPE OF SERVICES

Building Plan Review Process and Methodology

Outlined below is the general process WC² utilizes to provide plan review services. WC² has the capacity to provide all of the services requested by the jurisdiction. The following is presented as a guideline to be adjusted according to the unique processing procedures of your jurisdiction. We will work with your department in a seamless and timely manner for the review of plans and supporting documents for code compliance.

Review

- We can easily transition the comment structure in our plan review comment lists into your department's format.
- An electronic information file specific to your jurisdiction is created to identify items inherent and of interest to the department. This file will be maintained and utilized during each and every review, ensuring concerns are addressed.
- WC² understands code interpretations are subject to final review & approval by the Chief Building Official. It is further understood all plan review comments are subject to the review by the department's staff members.
- Plan reviews will be conducted within time frame guidelines established by the jurisdiction & identified under the Plan Review Schedule.
- Expedited reviews can be accommodated given a 24-hour notice.

Process

- Off-site plan reviews are offered and will be performed at WC² offices.
- We can also provide full or part time in house plan reviewers to suit your needs and assist in over-the-counter and same-day reviews.
- A courier service will be dispatched for pick-up on the same day when notified by noon, or otherwise within 24 hours. WC² will utilize our established shipping service account to pick up all documents to be delivered to our office at no additional cost to the jurisdiction.
- Correction lists will be electronically sent to the jurisdiction's designated staff member(s) for inclusion in a consolidated correction letter. Any other applicable correspondence will be sent via electronic mail.
- All communication with the applicant's designee will be conducted and coordinated as required to assist in responding to our plan review letters. We will work with your jurisdiction's preferred method of communication.
- Plan review approval will not be recommended to the jurisdiction until all code compliance issues are resolved and all permit issuance requirements of the department are satisfied.
Plan Review Turnaround Schedules

Our comprehensive plan reviews are returned promptly to meet your jurisdiction’s needs. WC³ will commit to completing plan reviews within the timeline expectations required by the jurisdiction. Our typical turnaround times are listed below. For extraordinarily complex projects, WC³ will immediately contact the department and agree on an appropriate turnaround time prior to starting the review.

Typical Plan Review Turnaround Schedule

<table>
<thead>
<tr>
<th>Type of Project</th>
<th>Turnaround Time *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Review</td>
</tr>
<tr>
<td></td>
<td>(Working Days)</td>
</tr>
<tr>
<td>New Residential Construction, Additions, and Remodels</td>
<td>10</td>
</tr>
<tr>
<td>New Multi Family</td>
<td>15</td>
</tr>
<tr>
<td>New Commercial Construction - Small</td>
<td>10</td>
</tr>
<tr>
<td>New Commercial Construction - Large</td>
<td>15</td>
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<tr>
<td>Commercial Additions</td>
<td>10</td>
</tr>
<tr>
<td>Tenant Improvements</td>
<td>10</td>
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</tbody>
</table>

*All turnaround times have been specified from the day they are received in our offices.

Typical turnaround time for complex projects is 15-days for the first review and 10 days for any re-check.

Expedited Plan Review

Accelerated plan review can be accommodated upon request from the City. For expedited or fast-track projects requested by the jurisdiction, we propose a fee of 150% of the professional service fees listed within this proposal and agreed upon by the City.

Expedited Plan Review Turnaround Schedule

<table>
<thead>
<tr>
<th>Type of Project</th>
<th>Turnaround Time *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Review</td>
</tr>
<tr>
<td></td>
<td>(Working Days)</td>
</tr>
<tr>
<td>New Residential Construction, Additions, and Remodels</td>
<td>5</td>
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<tr>
<td>New Multi Family</td>
<td>5</td>
</tr>
<tr>
<td>New Commercial Construction</td>
<td>5</td>
</tr>
<tr>
<td>Commercial Additions</td>
<td>5</td>
</tr>
<tr>
<td>Tenant Improvements</td>
<td>5</td>
</tr>
</tbody>
</table>

*All turnaround times have been specified from the day they are received in our offices.
Digital Review Capability and Plan Review Staffing

Digital plan review allows WC² the ability to review, mark-up and transport plans of any size electronically. We strongly encourage this service for our clients. This process delivers a high degree of cost effectiveness, time efficiency and a “green” and environmentally friendly system. Through our strong focus on utilizing digital plan review whenever available and possible, we offer clients full access to all WC² engineers and plans examiners company-wide, from any of our office locations. This service delivers an exceptional bank of expertise and knowledge base in all disciplines available for any type of project, specific jurisdictional demographics, and required code experience.

Online Plan Review Services

WC² will provide electronic plan review and the required protocol for electronic submittals and processing when this service is utilized. WC² can easily train jurisdictional staff regarding submittals, processing, and issuance of projects reviewed electronically. A secured online portal can be established for quick access and information regarding plan review status during the review process.

Communication & Meeting Availability

WC² staff members are available to discuss projects with City staff, project designers, and the construction team in person, by telephone, e-mail or web conference during normal business hours, at no additional cost to the jurisdiction.
Building Inspection

West Coast Code Consultants' inspectors are experienced in a wide variety of construction types and occupancies including residential developments, tenant improvements, commercial, institutional, essential service buildings and industrial projects. WCc provides our inspectors with all the tools, reference materials, and equipment needed to perform their duties.

We understand that a positive attitude and customer service skills are critical components to successful jobsite interactions, therefore, we employ inspectors who are experienced and skilled in dealing with people both at the front counter and in the field. All inspection personnel assigned to your jurisdiction will be able to read, understand and interpret construction documents, prepare and maintain accurate records and reports, communicate clearly both verbally and in writing and work effectively with contractors, the public, and jurisdictional staff.

Our staff will contact the Building Official (or his/her designee) for any code interpretations, local preferences, alternate means/methods exceptions, etc. Our inspectors will work closely with the Building Official regarding any field interpretations required for complex code items. If a concern should arise on a project our inspection staff will work proactively with all parties to resolve the issue.

We tailor our inspection services to meet the specific needs of our clients. We maintain a list of highly qualified personnel we utilize for both full time and interim needs. Inspection services will be sourced out of our local Sacramento office where we can draw upon our list of qualified candidates for the department's approval. We will provide inspection services within 24 hours of notification.

Assigned staff will perform continuous or periodic construction inspections to verify that the work of construction is in conformance with the approved project plans as well as identifying issues of non-compliance with applicable building codes.

In general, inspection services provided may include, but are not limited to:

- Performing all inspections through your Building Division and under the direction of the Chief Building Official or his/her designated staff.
- Performing all necessary building inspections in an efficient and courteous manner.
- Providing personnel who are professionally qualified and certified, as determined by the jurisdiction, to perform commercial, industrial and/or residential construction inspection.
- Projects under construction by permit shall be inspected for compliance with adopted Building Codes as amended by local ordinance.
- Coordinating inspection services with other pertinent departments as needed.
- Enforcing conditions of approval associated with discretionary permits.
- Overseeing special inspections and conducting investigations as directed by your department including field and office research and preparation of documents.
- Input of all inspection records into the department's permit tracking system, maintenance of all inspection records, correction notices, and all documentation related to design changes for all assigned projects.
- Resolving code interpretation issues in a timely and professional manner.
- Observing each project at the completion of the various stages of construction for compliance with the appropriate building codes and approved project plans.
- Coordination with the Building Division on all Certificates of Occupancy to confirm that all applicable departments and regulatory agencies have approved the project. We will also participate in any staff meetings and/or trainings as required by your jurisdiction.
Engineering Services

West Coast Code Consultants can provide the following scope of services by performing plan reviews at our office in Sacramento or, if requested, at City offices. WC2 uses an individualized review process tailored to meet a jurisdiction's particular needs and design requirements or guidelines. At project commencement, WC2 will prepare a customized plan review checklist to cover all industry standards and state or federal rules and regulations. The checklist is typically prepared from Cities' Municipal Codes/Ordinances, City standard plans and specifications, design guidelines available online to the general public, and any other public or confidential information made available to WC2 by City staff. Our experienced staff regularly reviews the following for grading and drainage plan submittals:

- Rough and Precise Grading Plans
- Hydrology/Hydraulic Studies
- Utility Plans & Profiles (Storm Drain, Sanitary Sewer, Water, Electric, Gas)
- Offsite Improvements and Encroachment Permits
- Sediment and Erosion Control Plans
- Storm Water Pollution Prevention Plans (SWPPP)
- Construction Details
- Demolition Plans
- Construction Cost Estimates (Engineer's Estimates/Probable Costs)
- Design and Implement Contingency Cost Percentage

We review the plans and supporting documents for compliance with the following:

- Geotechnical recommendations
- Hydrology Report
- Municipal Code, City Design Guidelines and Standards, or other City procedures and policies
- Community Plans (Specific Plan, General Plan)
- Caltrans Standards
- CEQA & Other Environmental Documents
- Final/Parcel Map & Subdivision Map Act
- National Pollution Discharge Elimination System (NPDES) permits
- Other Regional Agency Requirements (as they relate to infrastructure needs)
- ADA Compliance
- Traffic studies, parking issues
- Industry Standards

Our staff is trained and experienced in the following:

- NPDES Compliance, Specialized in Provision C.3 Compliance (MRP)
- Hydro-Management (HM), Certified Third Party Reviewer
- Construction Site Compliance for Water Quality Protection
- Manual on Uniform Traffic Control Devices (MUTCD)
Our staff is trained and experienced in the following:

- State General Construction Permit (QSD's/QSP's on staff)
- Caltrans Standard Specifications and Standard Plans
- Subdivision Maps Act & Land Surveyor’s Act
- Industry Standards

Map Review

Final maps, parcel maps, lot line adjustments and legal descriptions will be reviewed by licensed Land Surveyor. The surveyor will request and review all supporting documentation, easements, dedications etc. as required by the conditions of approval and as may be identified during the plan review process. QA/QC review will ensure all certificates, locations and details of all dedications and easements are incorporated in the final map/parcel map.

C3 Stormwater Plan Review and Inspections

WC³ will provide an exceptional staff of Licensed Civil Engineers (P.E.) and Qualified SWPP Developers (QSD) to provide C3 Stormwater plan review and, if needed, inspection services. Plans will be carefully reviewed for compliance with the city C3 Stormwater Technical Guidelines. WC³ has worked in multiple cities throughout California and is familiar with differences and intricacies of specific city guidelines and has completed plan review and inspected various treatment measures permitted by the C3 Stormwater Technical Guidelines, for public and private projects including Special Projects.

Survey Services

WC³ will provide survey services as per your request including, but not limited to: ground topographic survey and mapping, boundary line survey, prepare legal description, reviewing tentative maps, parcel maps, final maps, lot line adjustments, abandonment documents, and records of survey. In addition, we will serve as the City Surveyor and certify the technical correctness of maps and other documents submitted to the City under the Subdivision Map Act.

CASp Review and Inspection Service

Our CASp certified staff are knowledgeable of state and federal accessibility laws and regulations and possesses the expertise necessary to promote access to facilities for persons with disabilities. In accordance with newly-formed rules and regulations we can supply CASp certified professionals for review and/or inspection for accessibility and will comply with regulations to provide a sufficient number of building department staff who are CASp certified.

West Coast Code Consultants, Inc.
We propose the services of our Regional Manager, Mr. Michael Renner, CBO as our main point of contact for your jurisdiction. Mr. Renner is a highly experienced ICC Certified Building Official, Plans Examiner and Building Inspector, with extensive building department administration and management experience. He has successfully guided department staff through all phases of complex construction projects. His experience includes managing all common building department responsibilities, including plan review, multi-discipline inspections, scheduling plan review and inspections, field supervision, regulatory compliance, code interpretation, and project acceptance. He brings unparalleled customer service to many jurisdictions assisting and guiding designers, contractors, architects and homeowners through the building permit process.

Giyan Senaratne, will serve as Principal-in-Charge. He is a licensed California professional Engineer and the principal of WC3. Giyan has experience working with some of the most complex mixed-use buildings and industrial facilities throughout California and the Western United States. His knowledge of all codes is sought by many building officials and design professionals to assist in resolving difficult code issues. He is highly experienced in successfully managing municipal departments and agency projects from top to bottom including oversight of licensed engineers, architects and certified professionals holding exceptional qualifications and experience in assisting government agencies.
# Project Personnel

## Key Personnel

Our key personnel all have experience with building departments and have worked directly with municipalities, providing plan review and inspection services. The following is a brief description of the qualifications of our staff that would work directly with the City. We do not anticipate needing any sub-consultants for work in the City of Stockton. WC staffs over 110 professional plans examiners, engineers, architects, and inspectors providing an extensive network to satisfy all jurisdiction needs. Complete resumes can be found in the appendix.

<table>
<thead>
<tr>
<th>POSITION</th>
<th>LICENSES / CERTIFICATIONS / EDUCATION</th>
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</thead>
<tbody>
<tr>
<td>Giyan Senaratne</td>
<td>Principal-in-Charge</td>
</tr>
<tr>
<td></td>
<td>Registered Structural Engineer: California 4457</td>
</tr>
<tr>
<td></td>
<td>Registered Civil Engineer: California 46194</td>
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<tr>
<td></td>
<td>LEED AP Credential</td>
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<tr>
<td></td>
<td>Certified Access Specialist (CASp)</td>
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<td>+ 4 other licenses and certifications</td>
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<tr>
<td>Michael Remeni</td>
<td>Regional Manager</td>
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<td></td>
<td>ICC Certified Building Official</td>
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<td></td>
<td>Building Plans Examiner</td>
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<td></td>
<td>Residential Plans Examiner</td>
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<td></td>
<td>+7 other certifications</td>
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<tr>
<td>Donald Zhao</td>
<td>Plan Review Engineer</td>
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<tr>
<td></td>
<td>Registered Professional Engineer: California 79273</td>
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<td>ICC Master Code Professional</td>
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<td></td>
<td>ICC Building Inspector</td>
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<tr>
<td></td>
<td>ICC Building Plans Examiner</td>
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<tr>
<td></td>
<td>+25 other certifications</td>
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<tr>
<td>Todd Snider</td>
<td>Senior Structural Engineer</td>
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<tr>
<td></td>
<td>Registered Professional Engineer: California (CB6947)</td>
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<td>ICC Building Plans Examiner</td>
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<td></td>
<td>ICC Commercial Building Inspector</td>
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<td></td>
<td>+7 other licenses and certifications</td>
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<tr>
<td>Lisa O'Malley</td>
<td>Senior Plans Examiner</td>
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<td></td>
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<tr>
<td></td>
<td>Bachelor of Architecture, 1984</td>
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<tr>
<td>Marcus Johnson</td>
<td>Inspector Services Manager</td>
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<tr>
<td></td>
<td>Commercial Building Inspector</td>
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<tr>
<td>Zahra Fattah</td>
<td>Plan Review Engineer</td>
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<td></td>
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<tr>
<td></td>
<td>B.S. Structural Engineering, 1997</td>
</tr>
<tr>
<td></td>
<td>B.S. Applied Physics, 1995</td>
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## STATEMENT OF QUALIFICATIONS
for On-Call Building Plan Review and Inspection Services, Engineering Plan Review
PUR 17-001

<table>
<thead>
<tr>
<th>POSITION</th>
<th>LICENSES / CERTIFICATIONS / EDUCATION</th>
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<tbody>
<tr>
<td>Dennis Lockard</td>
<td>Fire Plans Examiner</td>
</tr>
<tr>
<td></td>
<td>ICC Certified Fire Marshal</td>
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<tr>
<td></td>
<td>ICC Fire Plans Examiner + 6 other certifications</td>
</tr>
<tr>
<td>CFM, CBO</td>
<td>SACRAMENTO, CA</td>
</tr>
<tr>
<td>Curtis Hume</td>
<td>Senior Structural Engineer</td>
</tr>
<tr>
<td></td>
<td>Registered Structural Engineer, California, Ca. 334.</td>
</tr>
<tr>
<td></td>
<td>Registered Civil Engineer, California, Ca. 3270S</td>
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<tr>
<td></td>
<td>+ 9 other licenses and certifications</td>
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<tr>
<td>PE, SE, MCP, CBO</td>
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<tr>
<td>Chris Kimball</td>
<td>Senior Structural Engineer</td>
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<td>ICAL-EMA Emergency Responder (72771)</td>
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<td>ICC Combination Commercial Plans Examiner + 31 other licenses and certifications</td>
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<tr>
<td>Homer Majel</td>
<td>Senior Plan Review Engineer</td>
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<td>PE, CBO</td>
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<tr>
<td>Doug Smith</td>
<td>Plans Examiner</td>
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<td>ICC Building Plans Examiner</td>
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<td></td>
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<td>MCR, CBO</td>
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<tr>
<td>Ganeida Williams</td>
<td>Senior Plans Examiner</td>
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<td>ICC Master Code Professional</td>
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<td>ICC Building Code Official</td>
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<td>ICC Code Enforcement Property Maintenance &amp; Inspections Inspector + 4 other certifications</td>
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<td>MCR, CBO</td>
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<tr>
<td>Talat Abbasi</td>
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<tr>
<td></td>
<td>Building Inspectors + 1 other licensed and certified personnel as needed</td>
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</table>

West Coast Code Consultants, Inc.
EXPERIENCE

Relevant Experience

Our team of professionals have experience and knowledge in furnishing comprehensive consulting services to many jurisdictions and agencies. Leading-edge digital plan review capacity, quick turnaround times and responsive staffing capabilities lead to time and cost-savings to all of our clients. WC will furnish the highest level of customer service to the City of Stockton, and to the ultimate client—your citizens. Presented is a sampling of notable projects representing our experience and knowledge with multiple construction types and occupancies. Distinct features of each project required a comprehensive understanding of Building Codes, Fire Codes, and other National, State and Local Standards. WC will work collaboratively with design teams to help resolve any code issues.

REDWOOD CITY APARTMENTS

This project consists of an 8-level, 137-unit multi-family residential development entailing one level of underground parking, 1 level of above ground parking, and 6 levels of for-rent apartments, located within the Downtown Precise Plan Area. Residential amenities include a fitness center & club room, bike room, outdoor private courtyard with a fountain, fireplace, kitchen/barbecue area, and an outdoor roof deck at level 8 of the building. WC performed the complete building and fire plans reviews for this project.

| OCCUPANCY: | R-2, S-2, B, A-3, |
| LOCATION: | City of Redwood City, CA |
| VALUATION: | $68 Million |
| CONTACT: | Gary Laporl, Chief Building Official 650.780.7350 |
| CONSTRUCTION: | III-A on top of I-A |
| DATE: | 2015-Ongoing |

NVIDIA

The NVIDIA project is a two-story office building with a two story parking structure beneath it. The gross building area is approximately 1,034,500 square feet. WC provided building, civil and smoke control review for this project.

| LOCATION: | City of Santa Clara, CA |
| VALUATION: | $55 Million |
| CONTACT: | Sharon Goel, CBO 408.615.2404 |
| CONSTRUCTION: | Type I-A & II-B, Sprinklers |
| DATE: | 2014-Ongoing |
APPLE CAMPUS 2

WC³ was selected to manage all structural plan review for this landmark project, as well as oversight on all quality control and flow through Apple and City processes. Apple Campus 2 is designed as a model for the 21st century workplace highlighting an integrated, unified and secure campus surrounded by green space. The entire 176-acre site is being redeveloped with sustainable, state-of-the-art offices, research and development facilities. The project replaces the current disjointed assemblage of aging corporate facilities with a single high performance office, research and development building, with supporting facilities. Apple selected the internationally renowned architectural firm Foster + Partners, headed by Norman Foster, as architects. The signature Main Building accommodates up to 12,000 employees and comprises approximately 2.8 million square feet in four stories, resulting in a significant reduction of overall building footprint when compared to the facilities that exist on the site. The Campus will feature a Central Plant that is integrated with the parking structure and serves all buildings on the Main Building site. In addition, office and research facilities accommodating up to 2,200 employees and comprising approximately 600,000 square feet will be located along North Tantau Avenue, with approximately 300,000 square feet of development east of North Tantau Avenue and approximately 300,000 square feet west of North Tantau. The 600,000 square feet of office, research and development space will comprise Phase 2, which is scheduled to commence construction after Phase 1 is completed. These additional buildings will house office and research and development functions that need to be located adjacent to the Main Building, and will be supported with approximately 1,740 parking spaces.
ORACLE DESIGN TECH HIGH SCHOOL

WC³ assisted the Bldg & Fire Department with the performance based design for this 2-story, 64,000 sq. ft. bldg & worked in developing alternate means & methods to safely design & build. WC³ performed the review of the architectural design of the project and the review & approval of the fire sprinkler/standpipe system, smoke management system & other technical features required for this project.

<table>
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<tr>
<th>E</th>
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<tr>
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<tr>
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<th>GARY LEPORI, CBO</th>
<th>650.780.7356</th>
<th>2016</th>
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<tbody>
<tr>
<td>CONSTRUCTION</td>
<td>CONTACT</td>
<td>DATE</td>
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PIXAR ANIMATION STUDIOS

This three-story building consisting of a basement, theaters, screening rooms, office space, and a grand atrium are all protected by a smoke control system. The structural system is poured in place concrete slabs with concrete shear walls. Scope of work included the complete plan review along with building inspection and project management.

<table>
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<td>VALUATION</td>
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<table>
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<tr>
<th>18 Sprinklers</th>
<th>CHARLES BRYANT</th>
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THE VINTAGE VILLAGE

This Vintage Village includes 16 two and three story apartment clusters, 4 story podium totaling 345 unit residential apartments, three retail / office buildings, and free standing CVS. WC³ scope of work included the complete plan review along with building inspection.

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<table>
<thead>
<tr>
<th>I-A, IIIA, VB</th>
<th>DENNIS COLBERT, C.O.O</th>
<th>925.931.5303</th>
<th>2014-Ongoing</th>
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<tbody>
<tr>
<td>CONSTRUCTION</td>
<td>CONTACT</td>
<td>DATE</td>
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</table>
YOUTUBE

The YouTube project consisted of an extensive renovation of over 64,000 square feet of the first floor. WC3 provided complete plan review services for this project.

B, A-3
OCCUPANCY
SAN BRUNO, CA
LOCATION
$6.7 MILLION
VALUATION

TYPE II-B,
SPRINKLERS
CONSTRUCTION
SHARON GOEL, CBO
408.615.2404
CONTACT
2014-2015
DATE

CITY CENTER BISHOP RANCH

A reinvention of the suburban shopping center model in which community, culture and commerce will converge. A 300,000 square feet of shopping, dining and entertainment. This project also includes a movie theater, mall, & parking garage. WC3 is currently completing the fire plan reviews for this monumental project.

A3, A2, B, M, S1
OCCUPANCY
EMERYVILLE, CA
LOCATION
$750 Million
VALUATION

VARIOUS FROM
TYPE I-A TO II-B,
SPRINKLERS
CONSTRUCTION
CHRISTINA KEIFER,
DIVISION CHIEF,
925.838.6681
CONTACT
2014-ONGOING
DATE

SUTTER HEALTH PARKING STRUCTURES RENOVATION

Sutter Health parking structure renovation consists of architectural barrier removal, relocation of accessible parking, structural renovations, restriping of existing parking layout, existing entry gate renovation, addition of electric vehicle charging stations, accessibility / general signage and lighting renovations. WC3 provided complete plan review including accessibility, structural, and MEP.

S-2
OCCUPANCY
SACRAMENTO, CA
LOCATION
$2.5 MILLION
VALUATION

I-A
CONSTRUCTION
WINFRED DELEON,
PE, CBO
916.808.5475
CONTACT
2015-2016
DATE
EXPERIENCE

STANFORD HEALTH CENTER
The Stanford Health Center consists of approximately 132,940 gross interior square footage of interior tenant improvement for medical offices (outpatient) use in 4 story shell. 4 story MOB, 2nd story is an outpatient facility including MRI rooms, CT Scan, Surgical Center, and Pharmacy.

OCCUPANCY: S-2, B, 1, 2, 1, H-2
LOCATION: City of Emeryville, CA
VALUATION: $68 Million
CONTACT: Victor Gonzales, Chief Building Official 510.596.4310
CONSTRUCTION: 1-B
DATE: 2015-Ongoing

3900 ADELINE STREET
New apartment complex on a 1.2-acre site with a new podium structure which include an underground parking garage and 4, 4-story apartment buildings above in a mixed commercial/residential area. The site has 28 flow-through planter both at the podium level and grade level, 1 self-treating area, and 3 bioretention areas. WC1 performed the entire building plan review, C.3 review, and inspections for the project.

OCCUPANCY: R-2, A-2, A-3
LOCATION: City of Emeryville, CA
CONTACT: Victor Gonzales, Chief Building Official 510.596.4310
CONSTRUCTION: 1-A, V-A
DATE: 2015-2016

CALIFORNIA ENERGY COMMISSION POWER PLANT CONSTRUCTION
West Coast Code Consultants, Inc. provides additional and unique project management services. Currently we are the appointed Delegate Chief Building Official for multiple active energy producing power plants throughout the state. In addition, we are the Authority Having Jurisdiction (AHJ); our firm manages all aspects of the projects. All Public Works, Engineering, Planning, Building and Administrative plan reviews and Inspections are handled by WC1.
REFERENCES

Client References

> CITY OF DUBLIN

CONTACT:
Gregory Shreeve
Building Official
100 Civic Plaza
Dublin, CA 94568
916.835.6628
gregory.shreeve@dublin.ca.gov

SERVICES:
Building Plan Review,
Staff Augmentation
2013—Ongoing

> CITY OF VACAVILLE

CONTACT:
Jay Salazar PE, CASp 075
Chief Building Official
675 Merchant Street
Vacaville, CA
707.449.5342
jay.salazar@cityofvacaville.com

SERVICES:
Building Plan Review, Inspection, and
Staff Augmentation
2014—Ongoing

> CITY OF BERKELEY

CONTACT:
Alex Roshal
Chief Building Official
2126 Milvia Street
Berkeley, CA 94704
510.981.7400
aroshal@cityofberkeley.info

SERVICES:
Building Plan Review, Staff
Augmentation
2013—Ongoing

> CITY OF CUPERTINO

CONTACT:
Albert Salvador, PE, CBO
Chief Building Official
1030 Torre Avenue
Cupertino, CA 95014
408.777.3206
alberts@cupertino.org

SERVICES:
Building Plan Review
2011—Ongoing

> CITY OF HAYWARD

CONTACT:
David Rizk
Community Development Director
777 B Street
Hayward, CA 94541
510.583.4004
david.rizk@hayward-ca.gov

SERVICES:
Building Plan Review, Inspections, Front
Counter, Staff Augmentation
2010—Ongoing

> CITY OF CALAVERAS

CONTACT:
Brian Moss
Asst County Administrative Officer
Gov., Ctr. 891 Mountain Ranch Road
San Andreas, CA 95249
209.754.6025
bmoss@co.calaveras.ca.us

SERVICES:
Building Plan Review, Interim CBO,
Staff Augmentation, Inspections
2015—Ongoing

> CITY OF SAN BRUNO

CONTACT:
Roy Bronold
Chief Building Official
567 El Camino Real
San Bruno, CA 94066
650.666.7020
rbronold@sanbruno.ca.gov

SERVICES:
Building Plan Review, Staff
Augmentation
2014—Ongoing

> CITY OF EMERYVILLE

CONTACT:
Charles Bryant
Planning & Building Director
1333 Park Avenue
Emeryville, CA 94608
510.996.4361
cbryant@emeryville.org

SERVICES:
Building Plan Review, Inspection, Front
Counter Support, Code Enforcement
2006—Ongoing

> CITY OF REDWOOD CITY

CONTACT:
Gary Lepori
Chief Building Official
1017 Middlefield Road
Redwood City, CA 94063
650.780.7350
glepori@redwoodcity.org

SERVICES:
Building Plan Review, Fire Plan
Review, Fire Marshall, Fire
Inspections, 2011—Ongoing
**Electronic Document Management & Review**

Should the jurisdiction request documents be transported electronically or tracked electronically, WC³ provides a web-based electronic document management system which allows applications to be 100% paperless. Our EDMS allows applicants to submit plans and documents electronically, and much more.

- Electronic submission of large or small documents
- Electronic plan reviews
- View all submitted documents
- View red-marked comments on files
- Track submittal status
- Sign and issue permit documents electronically
- Track field reports and upload project photos.
- Maintain a distinct and secure EDMS per jurisdiction or large project
- Send notification of submittal or permit status
- Provide secure usernames and passwords to interested parties
- Electronic archiving of plans, specifications, calculations and reports
- Can accommodate any type or size of project

Building on the great success of our EDMS, WC³ has developed **eProcess360** which is a web-based Document Management System that is used by several jurisdictions throughout the United States. This program expands the EDMS functionality to accommodate the needs of a stand-alone jurisdiction. **eProcess360** not only manages the jurisdiction's processes, but also the public access to apply for a permit, submit documents, view status, pay fees, schedule inspections, view permitted files and much more. More importantly, much of the system can be easily customized by the jurisdiction's own staff.

**Additional Services**

As a leading consultant with exceptional resources, we also offer the following services. We would be pleased to expand on any of our qualifications:

- Delegate CBO Services
- Fire Prevention Services
- Storm Water Management
- Traffic Engineering
- Construction Management
- Development Services
- Capitol Projects
- ADA Surveys
- Inspector of Record Services
- Constructibility Reviews

Thank you for considering WC³, we look forward to working with the City of Stockton and to aid the City's continued growth and success.
APPENDIX

Appendix

Financial Statement
Non-Collusion Affadavit
Resumes
Giyan Senaratne, PE, SE, LEED AP, CASp  
Principal | Senior Structural Engineer

Background

Mr. Senaratne has over 25 years of experience providing professional building and safety services to numerous government clients. He has exceptional experience reviewing building plans and has been exposed to all types of construction and occupancy groups from residential homes to high-rise structures, complex industrial plants, and large scale power plants. He is actively involved with code development at the State level and is a sought-after lecturer for code training to building officials, design professionals and contractor organizations.

Work Experience

2006-Present

**West Coast Code Consultants**  
Principal | Senior Structural Engineer  
Manages all services for the firm; performing plan reviews, building department services, managing contract inspection services, and contract management for various client jurisdictions throughout California.

2005-2006

**Linhart Petersen Powers Associates | Bureau Veritas**  
Unit Manager  
Senior Structural Engineer managing the plan review and inspection services for the City of Emeryville. Actively involved in the integration of staff from various acquisitions by Bureau Veritas in North America, as well as, reviewed plans for multiple jurisdictions in Utah, Nevada, and Arizona.

2004-2005

**Linhart Petersen Powers Associates**  
Principal – Minority Shareholder  
Senior Structural Engineer managing the plan review and inspection services for the City of Emeryville. Principal-in-Charge of LP²A operations in Arizona. In addition, reviewed plans for several jurisdictions in Utah and Nevada.

1995-2004

**Linhart Petersen Powers Associates**  
Supervising Plan Review Engineer, Supervising Plan Review Engineer, Associate and Senior Associate  
Managed the plan review and inspection services for the City of Emeryville and reviewed residential, commercial, and industrial plans for UBC, IBC, UPC, IPC, UMC, IMC, T-24 Energy and T-24 Accessibility compliance for numerous jurisdictions in California as well as several other states. Assisted jurisdictions with in-house plan review and over-the-counter plan review. Performed building official duties on an interim basis.

1994-1995

**International Conference of Building Officials**  
Regional Engineer  
Reviewed plans of proposed buildings for structural, non-structural, energy, and accessibility requirements. Provided verbal and written code opinions for conference.

1993-1994

**City of San Mateo, CA**  
Building Official  
Managed a full range of building services, including public service, plan check, and inspection for a population of 87,000 with a yearly budget of $850,000. Coordinated with numerous other City agencies such as planning, fire, police and public works in the construction of buildings. Established goals and standards for customer service, staff training, quality control, turn-around times, streamlining building processes and staff cross training. Drafted and presented ordinances to the City Council. Represented the City in litigation issues. Reviewed and recommended ADA compliance options for City-owned facilities.
Background

Mr. Renner is a highly experienced ICC Certified Building Official, he brings considerable knowledge and experience with municipal budget preparation, building administration, personnel supervision, code knowledge and provides a high level of customer service to our clients. He stays current and informed on industry-related matters through extensive participation within key industry organizations and certification programs. These programs and affiliations continually enhance the level of service he provides to our clients. Michael’s management approach focuses on mentoring his staff and improving department processes to ensure services are delivered with a high level of customer service. He is committed to serving the needs of our clients through strong leadership and an effective collaborative approach.

Work Experience

2016-Present  **West Coast Code Consultants, Inc.**  Regional Manager
Oversees the Sacramento and Central California Region providing Project Management, Building Official, Plans Examiner and Building Inspector duties, with extensive building department administration and management experience. He successfully guided department staff with inspection and plan review through all phases of complex construction projects.

2014-2016  **Interwest Consulting Group**  Building Official
Provided interim Building Official services for the County of Calaveras, the Town of Atherton and the City of American Canyon. My responsibilities include performing building department management functions and developing processes and procedures for plan check, inspection and permit issuance for jurisdictions. I coordinate department activities, assist clients with the permit process and resolve customer complaints, update handouts and website documents, create budgets and provide reports on building department activity.

2013-2015  **Interwest Consulting Group**  Plans Examiner
Provided review services for residential and non-residential construction project plans for compliance with California Building, Plumbing, Mechanical, Electrical Codes, Energy Standards and California Accessibility Standards, state and local building codes, policies, amendments, and ordinances. Currently, I provide as-needed in-house plan review services for the County of Napa and the Town of Atherton.

2009-2012  **Self-Employed**  Consultant
Worked with various contractors in Northern California reviewing and inspecting construction projects for compliance with all State, Federal and local policies and regulations.

2006-2009  **California Nail**  Superintendent
Responsible for commercial projects up to one million square feet, from layout to finish, and completed these projects on time and on budget.

2004-2006  **Freestyle Concrete**  Construction/Shop Superintendent
Supervised the construction and installation of concrete countertops and floor overlays, oversaw the complete running of the fabrication shop, hiring of employees and coordinated with contractors. I also estimated material and man hour requirements to complete projects.

2002-2004  **The Nailing Company**  Foreman | Estimator
Examined and inspected work progress and sites to verify safety. My responsibilities included ensuring all specifications were met, reading blueprints to determine construction requirements and plan procedures.
Background

Mr. Zhao has over ten years of engineering experience including building design, construction, and code compliance. He is a licensed professional engineer and holds numerous ICC certifications encompassing significant plan review and inspection designations. He also has achieved the highest level of certification ICC offers—Master Code Professional (MCP)—the gold standard for demonstrating proficiency in the building and fire safety profession. He brings unparalleled customer service to many jurisdictions assisting and guiding designers, contractors, architects and homeowners through the building permit process as well as providing onsite and on-call and plan review, inspection and front counter support.

Education

Bachelor of Science
Civil Engineering
San Jose State University, 2006

Licenses | Certifications
Professional Engineer
State of California (79273)
ICC 53000664:
Accessibility Inspector/Plans Examiner
Building Inspector
Building Plans Examiner
CA Commercial Mechanical Inspector
CA Commercial Plumbing Inspector
CA Residential Building Inspector
Building Code Official
Building Official
Mechanical Code Official
Plumbing Code Official
Combination Inspector
Commercial Building Inspector
Commercial Combination Inspector
Commercial Electrical Inspector
Commercial Mechanical Inspector
Commercial Plumbing Inspector
Electrical Inspector
Master Code Professional
Mechanical Inspector
Mechanical Plans Examiner
Plumbing Inspector
Plumbing Plans Examiner
Residential Building Inspector
Residential Combination Inspector
Residential Electrical Inspector
Residential Energy Inspector/ Plans Examiner
Residential Mechanical Inspector
Residential Plans Examiner
Residential Plumbing Inspector
CAL EMA Safety Assessment Program Evaluator | 69019

Work Experience

2015-Present
West Coast Code Consultants
SF Peninsula Regional Manager
Oversee the building and fire plan review and services provided by the South San Francisco Office. This includes the management of administrative, plan review, and inspection staff. Accountable for the complete plan review of projects to ensure designs are safe and in compliance with the adopted building and fire code.

2013-Present
West Coast Code Consultants
Senior Plan Review Engineer
Perform plan reviews, building department services, manage contract jurisdiction services for various client jurisdictions throughout California, including Cities of Redwood City, San Bruno, San Carlos and South San Francisco. Perform 3rd party plan reviews for major tech and bio-tech companies on behalf of client jurisdictions.

2014-Present
City of San Bruno
Contract Plan Review Engineer
Perform plan review in the City of San Bruno Building Division. Provide support for the Chief Building Official.

2009-2013
City of Half Moon Bay
Public Works/Building Plan Review Engineer/Inspector
Consultant staff member performing onsite plan review, inspection and front counter services for client jurisdiction.

2012-2013
CSG Consultants
Plan Review Engineer/Inspector

2006-2011
CSG Consultants
Plans Examiner/Inspector
Consultant staff member performing onsite plan review, inspection and front counter services for client jurisdictions.
ATTACHMENT A

Todd Snider, PE, SE
Senior Plan Check Engineer

Background

Mr. Snider is a licensed structural engineer and an ICC certified building & energy plans examiner. He received his Master's degree from the University of Utah with an emphasis in structural engineering and has served as the Chairman of the Residential Building Committee for the Structural Engineer’s Association of Utah (SEAU). He provides plan review services to many jurisdictions throughout the western United States and has had multiple years of experience in the structural design of a variety of building types.

Work Experience

2011-Present  West Coast Code Consultants, Inc.  Plan Review Supervisor
Manages plan review services for the firm. Supervises review of projects. Provides plan reviews including, architectural, structural, energy, and Green Code.

2006-2011  Ward Engineering Group  Project Engineer
Performed structural design including preparing structural drawings and calculations for various projects. Designed multiple buildings and structures including houses, foundations for metal buildings and LNG tanks, tilt-up buildings, masonry structures, parking garages, hotels, business, and other structures.

2005-2005  United Engineering Group  Engineering Intern
Designed preliminary plats and final plat layouts for future subdivisions. Prepared drainage reports and studies for various developments. Performed feasibility studies for the development of various properties.
Lisa O’Malley
Plan Review Architect

Background

Ms. O’Malley provides exceptional plan review with over thirty years in the industry; fifteen of those as a plan review architect. She is an ICC certified plans examiner. Her expertise has expanded to extensive review of tenant improvements, new commercial buildings, existing single-use and mixed-use buildings, historical buildings, with specialized accessibility review on the landmark Apple Campus 2 project currently in process in Cupertino, CA. She also provides client support in plan review within local jurisdictions for multiple municipalities including Mountain View, Burlingame, Danville and Vallejo.

Work Experience

2011-Present  West Coast Code Consultants, Inc.  Plan Review Architect
Plans Examiner responsible for fire-life-safety, mechanical, plumbing, electrical and T-24 energy reviews for residential remodels and additions, new single-family homes and commercial tenant improvements.

1998-2011  LP²A/Bureau Veritas  Plan Review Architect
Plans Examiner responsible for the non-structural review of residential projects and commercial tenant improvements. Provided in-house services with over-the-counter plan review, code interpretations, and resolution of code issues with applicants at the City of Burlingame.

Sample Projects

Apple Campus 2
Cupertino, CA

Police Department
New Construction
Redding, CA

Strawberry Lodge
Senior Housing
Berkeley, CA

Habit Burger Restaurants
Redding, CA
Vallejo, CA

Hampton Town Homes
Campbell, CA

Satellite Dialysis Center
OSHPD 3 Project

Meyers Expansion
Vallejo, CA
Zahra Fattah
Plan Review Engineer

Background
Ms. Fattah has over 12 years of structural engineering experience with her most current work as a plan review engineer. Her experience involves working in seismic design of existing structures involving concrete, timber, steel and masonry elements. She is experienced in carrying out all phases of building projects including initial design development, developing and coordinating construction documents. She is experienced in coordinating construction administration, in gravity and seismic design of new buildings, in the design of both existing and new residential, office and commercial buildings. She is a superior problem solver, with strong customer service skills; valuable in her work as an on-call plan reviewer within multiple client jurisdictions.

Work Experience

2010-Present  West Coast Code Consultants, Inc.  Plan Review Engineer
Performs building plan reviews for commercial, industrial, and residential buildings for compliance with the multiple building codes, including architectural and structural, as well as minor plumbing, mechanical and electrical requirements. Provides code interpretations and resolve code issues with permit applicants.

2005-2010  TEAC Structural Engineers  Project Manager
Assessed project requirements and determined the project schedule and necessary staff required to complete the building plans on time. Maintained coordination between the client, architect, and the in-house design team, as well as the field inspection and construction team. Acted as the primary design engineer on many projects which included retail, hospitality, custom homes, single family production housing, and multi-family housing.

2002-2003  HolmesCulley  Project Engineer
Structural engineer responsible for the seismic upgrade of several existing URM buildings, as well as the design of several commercial remodels.

2000-2002  Himmati Engineering  Project Engineer
Structural engineer responsible for the seismic upgrade of several existing URM buildings and the design of new residential and commercial buildings.

1998-2000  HolmesCulley  Project Engineer
Structural engineer responsible for the seismic upgrade of several existing URM buildings, as well as the design of several commercial remodels.
ATTACHMENT A

Dennis Lockard, BS, CBO, CFM
Fire and Life Safety Plans Examiner

Background

Mr. Dennis Lockard, with over 40 years of regulatory practice coupled with extensive municipal experience providing services for clients and jurisdictions. Dennis Lockard was Deputy Chief, Fire Marshal with the City of Newport Beach retiring in 2005. Dennis has also served as Building Official for municipalities including the City of Atherton and Watsonville. With a passion for the field of code application and fire prevention, Dennis has dedicated his career to that endeavor. Well known as a compassionate leader focused on customer service in the public sector, he brings the experience, knowledge and people skills with excellent customer service.

Work Experience

2015-Present  West Coast Code Consultants, Inc.  Plans Examiner
Oversee the plan review services provided by West Coast Code Consultants for various jurisdictions. Applied extensive fire prevention knowledge and experience to ensure all plan reviews exceed expectations and ensure Fire safety to the community.

2005-2015  CSG Consultants  Consultant Associate
Responsible for plan review and inspection services for public agencies. Some of the agencies served directly by Mr. Lockard include the Orange County Fire Authority, Anaheim Fire Department and Redwood City Fire Department. Mr. Lockard is also proficient and works routinely with electronic plan review dramatically improving the plan submittal and approval process. Notable projects and assignments include, Contract Building Official for Atherton, Fire Marshal in Charge of Anaheim Regional Transportation Intermodal Center, Anaheim California; Project Plans Examiner, Redwood City.

Manager of Fire Prevention Services, Responsible for developing and implementing fire prevention services as one of the strategic services CAA provides in California and Nevada. Also involved in the marketing of the building safety services and acted as a liaison for both fire and building services.

1994-2005  Newport Beach Fire Department  Deputy Chief / Fire Marshal
Deputy Chief Fire Marshal, Responsible for the supervision of all fire prevention related activities throughout the City and participating as part of the executive team that lead the fire department. While as Fire Marshal provided community planning and code development and provided leadership in code development and training of personnel.
Background

Mr. Hume has over 35 years of structural engineering experience, with 20 years as a design engineer and 15 years as a structural plan review engineer. He brings a broad range of experience to any project. As a structural plan review engineer he has reviewed hundreds of projects for jurisdictions throughout California, Colorado, Utah, and Nevada. Types of projects reviewed include single family dwellings, podium type residential complexes, corporate office campuses, large industrial and manufacturing facilities, electrical power generating plants, and public elementary schools.

Work Experience

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<tr>
<th>Year</th>
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<th>Position</th>
<th>Details</th>
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<tbody>
<tr>
<td>2010-Present</td>
<td>West Coast Code Consultants</td>
<td>Senior Structural Engineer</td>
<td>Performing structural plan review for multiple client jurisdictions throughout California.</td>
</tr>
<tr>
<td>2007-2010</td>
<td>Interwest Consulting Group</td>
<td>Regional Manager/Senior Plan Review Engineer</td>
<td>Senior Structural Engineer managing the plan review services for the San Francisco Bay Area and East Bay as well as performing structural plan reviews for client jurisdictions.</td>
</tr>
<tr>
<td>1999-2007</td>
<td>Linhart Petersen Powers Associates</td>
<td>Supervising Senior Structural Engineer</td>
<td>Senior Structural Engineer supervising plan review services for multiple client jurisdictions. In addition, reviewed plans for jurisdictions throughout Northern California.</td>
</tr>
<tr>
<td>1999-2007</td>
<td>DES Architects + Engineers, Inc.</td>
<td>Senior Associate, Department Head</td>
<td>Lead structural engineer performing design and architectural services.</td>
</tr>
<tr>
<td>1999-2007</td>
<td>Wildman &amp; Morris, Inc.</td>
<td>Project Structural Designer and Civil Engineer</td>
<td></td>
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</table>

Education

- M.S., Business Administration, San Jose State University, 1997
- Master of Engineering, Civil Engineering, University of California, Berkeley, CA, 1981
- Bachelor of Science, Civil Engineering, Carnegie Institute of Technology, 1979

Licenses and Certifications

- Structural Engineer, State of California (SE.2153)
- State of Oregon
- State of Utah
- State of Washington
- State of Nevada (SE.1521)

Professional Affiliations

- Member, Structural Engineers Association of Southern California
- Member, American Society of Civil Engineers
ATTACHMENT A

Chris Kimball, PE, SE, MCP, CBO
Senior Plan Review Engineer, Fire Plans Examiner, Fire Inspector 2,
Combination Building Inspector, Regional Manager

Background

Mr. Kimball is a licensed structural engineer and an ICC Certified Master Code Professional, Certified Building Official, combination plans examiner, combination inspector, and fire plans examiner/inspector. He received his Master’s degree from Utah State University with an emphasis in structural engineering and currently serves as the President of the Beehive Chapter of ICC. He has also served as past-president of the Structural Engineer’s Association of Utah. He provides plan review services to many jurisdictions throughout the western United States and is often asked to provide training to code officials, design professionals, and contractors regarding the construction requirements of the International Building Codes.

Work Experience

2009-Present
West Coast Code Consultants, Inc. Utah Regional Manager
Oversee the plan review and building inspection services provided by the Utah Regional Office. This includes the management of administrative, plan review, and inspection staff. Accountable for the complete plan review of projects which are seeking a building permit to ensure that designs are safe and in compliance with the adopted building codes. Responsible for providing technical training classes to clients, building officials, design professionals, contractors, and owners.

2005-2009
Kimball Engineering, P.C. President/Owner
Provided structural and complete plan review services to local jurisdictions throughout Utah, Arizona, Nevada, and Wyoming. Often provided training with regards to the structural building code requirements for both new and existing buildings to building official, design professional, and contractor organizations.

2005-2007
Salt Lake City Corporation Structural Plans Examiner
Performed structural review of plans, specifications, calculations, and engineering reports to ensure compliance with the adopted building codes. Met with clients, design professionals, contractors, and owners to discuss projects during the design-development stage and throughout the construction process. Provided training classes to design professionals to help them understand the structural requirements of the code. Provided engineering design and consulting services for city-owned projects.

2003-2005
U.S. Bureau of Reclamation Civil Engineer
Responsible for the structural design of a wide variety of civil projects including the retrofit of power plants, design of new buildings, and repairs to concrete and earth dams. Prepared construction documents, including drawings and detailed project specifications for solicited work. Reviewed designs performed by the Technical Services Center, Area offices, and private consultants. Participated in several value engineering studies.

2002-2003
C.A. Dept. of Water Resources Civil Engineer
Provided preliminary designs for the repair of levees and other flood mitigation measures. Reviewed proposals and work performed by consultants. Developed required hydrology for modeling purposes. Reviewed hydraulic modeling efforts involved in writing/reviewing a joint EIR/EIS. Prepared construction cost estimates and created a project website.

Education
Master of Engineering
Structural Engineering
Utah State University, 2001
Bachelor of Science
Civil Engineering
Utah State University, 2000

Licenses/Certs
Professional Engineer
Washington, 591117
California, C 151657
Nevada, 019503
Arizona, 49503
Structural Engineer
Utah, #753079-2003
Certifications
ASCE Master Code Professional
Certified Building Official
Combination Plans Examiner
5-Way Commercial Inspector
Residential Plans Examiner
Residential Energy
5-Way Residential Inspector
Accessibility Plans Examiner
Fire Plans Examiner
Fire Inspector I & II

Affiliations
Structural Engineer’s Association of Utah Past President
Utah Chapter of ICC
Bonneville Chapter of ICC
Beehive Chapter of ICC Past President

Awards
SEAU Past President
Past President 2013
ICC Utah Chapter
Industry Award for Excellence 2010
U.S. Bureau of Reclamation
Ely Award 2005
Homer Maiel, PE, CBO
Senior Structural Engineer, Plans Examiner, Building Inspector,
Building Official

Background

Mr. Maiel brings extensive building industry experience to every project with over 30 years of plan review as well as management experience. His career encompasses over 23 years of experience with the City of San Jose and the Town of Los Gatos as a supervising plan review engineer and plan review engineer. His longtime involvement as a member of the American Society of Civil Engineers, International Code Council, American Wood Council and the American Institute of Steel Construction assures up-to-date code knowledge and application. He is skilled at working within client jurisdictions providing successful plan review to home owners, developers, architects and contractors on high level construction projects. Currently, he is assisting the City of Cupertino on the iconic Apple Campus 2 projects as well as other high level projects within the Bay Area.

Work Experience

2010-Present
West Coast Code Consultants, Inc.
Senior Structural Engineer, Plans Examiner, Building Official, Senior Inspector
Performs building plan reviews for client jurisdictions; Reviews for conformance to the multiple building codes. Provides code interpretations and resolve code issues with permit applicants. Provides onsite structural engineer services. In addition

1986-2010
City of San Jose
Supervising Plan Review Engineer
Supervised Plan Check groups, distributed projects to engineers and inspectors and monitored their progress. Worked as a plan check engineer for various residential and commercial projects. Supervised the Permit Center, the PC consists of over sixteen to eighteen permit specialists, inspectors, and engineers. The PC's duty was to issue the permits and to take in the plans for review. Supervised the work of this group on a daily basis. As a PC Supervisor reviewed permit fees and construction taxes.

1985-1986
Town of Los Gatos
Plan Review Engineer
Performed plan review for residential and commercial projects as well as occasional field inspections.

1984-1985
Peter Culley and Associates
Project Engineer
Performed structural design of residential and commercial projects.

1981-1984
Bechtel Power Corp.
Design Engineer
Performed structural design and analysis of nuclear power plants.

1979-1981
Allied Engineering
Project Engineer
Performed structural design and analysis of residential and commercial projects.
ATTACHMENT A

Nader Dahu, PE
Senior Civil Engineer / Project Manager

Background

Mr. Dahu is a licensed civil engineer with over twenty seven years of Municipal Government experience in Civil engineering, Streets, Storm Drain, Water, Wastewater, Traffic, Transportation, Construction, and Structural engineering. He has experience managing multi-million-dollar Capital Improvement Program (CIP) (Planning, Budgeting, Designing, Inspecting and Managing Construction and Close-Out) as well as worked as a Project Manager of General CIP, Streets, Storm Drain, Water, Wastewater, Traffic, Transportation, and Local, State, Federal Funded Projects from Inception through Construction and Close-Out. His high level of experience allows him to provide senior level management skills, and act as a staff liaison between West Coast Code Consultants, Inc., city personnel, and other (Private and Public) agencies.

Work Experience

2016-Present  
West Coast Code Consultants, Inc.  Senior Engineer / Project Manager
Provide the highest level of project management and civil plan review for numerous municipalities in the California Bay area. Completed review of private subdivisions and/or development improvements plans for both on-site improvements and public right-of-way improvements for compliance with grading, drainage, NPDES, and encroachment standards as well as review of hydrology maps and hydraulic calculations for private and public storm drain systems for compliance with City standards and State water laws.

2003-2016  
City of San Bruno  Associate Civil Engineer
Provided civil plan review services for the City of San Bruno including analyzing and design of residential and commercial buildings, structures, and foundations, traffic engineering evaluation, reports, studies, speed survey, operation and design of traffic signals, as well as the technical review and management of residential & commercial developments. Provided program management to the Disadvantage Business Enterprise (DBE), Pavement Management Program (PMP) Encroachment and Utility Permit Administration, Grant Applications, and Local, State and Federal Funded Projects. In addition, provided review of CEQA documents, geotechnical investigations, traffic studies, and similar engineering reports to understand issues that may impact the design of private sub-divisions or development improvements, and/or public streets or utility infrastructure.

1996-2016  
Alameda County Public Works Agency  Asst. Engineer/Jr. Engineer
Provided review and approval of designs and construction plans submitted by private constituents and professionals affecting existing and/or future public facilities, infrastructures, and right-of-way. Proactively communicating with private developers and associated design professionals by telephone, e-mail, written correspondence, and face-to-face meetings to discuss plan check review comments.

1989-1990  
Alameda County Public Works Agency  Private Consultant
Completed review of tentative maps and similar private subdivision and/or development applications. Preparation of Engineering-specific Conditions of Approval related to Tentative Maps and similar private subdivision and/or development applications. Reviews included subdivision maps, lot line adjustments, or lot merger applications for conformance with the Subdivision Map Act.
Doug Smith, MCP
Building Plans Examiner | Inspector
Fire Plans Examiner | Inspector

Work Experience

2013-Present  West Coast Code Consultants  Plans Examiner / Building Inspector
Performs plan review and inspections for both fire and building projects; residential and commercial. He works for varied jurisdictions as an extension of their staff as well as out of WC3 offices.

2005-2013  Kaysville City | Kaysville, UT  Building Inspector
Performed building inspections for commercial, industrial, and residential buildings for compliance with the multiple building codes, as well as provides senior level inspections on client projects.

1998-2005  Michael K. Wright Construction | West Jordan, UT  Former
Worked on varied projects as construction framer. Supervised construction crew.

Education

General Education
General Education Courses
Salt Lake Community College, Utah, 2002-2004

Licenses & Certifications

ICC Certifications
Master Code Professional | 5251921
Building Official | 5251921
Fire Plans Examiner | 5251921
Fire Inspector 1 and 2 | 5251921
Combination Commercial Building Inspector | 5251921
Combination Commercial Plans Examiner | 5251921
Combination Residential Building Inspector | 5251921
Residential Plans Examiner | 5251921
Accessibility Inspector / Plans Examiner | 5251921

Professional Organizations

Utah Chapter of ICC  Tri-Chapter Region Coordinator
Utah Chapter of IAEI  Second Vice President (Present)
Bonneville Chapter of ICC  President (2012 – 2013)

Awards
Bonneville Chapter of ICC  President 2012

www.wc-3.com  801.547.8133  doug@kimballeng.com
George Williams, MCP, CBO
Senior Plan Reviewer / Senior Inspector

Background

Mr. Williams has worked on a contract basis for numerous jurisdictions in Utah, Wyoming and North Dakota throughout his 10 year career in the industry. From 2009 through mid 2014 he acted as the contract building official for Holladay City, Utah as well as the resort town of Alta, Utah. Mr. Williams was instrumental in the complete start-up of two counties building departments in Western North Dakota including the adopting of codes, implementation of permitting processes as well as the development of policies and procedures in a part of the country where no previous form of building or construction regulatory processes existed. In addition to substantial municipal work Mr. Williams has acted and continues to act as Lead Inspector for a number of multi-million dollar projects for Utah’s Division of Facilities and Construction Management (DFCM). Mr. Williams has extensive ICC certifications and was one of the first handful of ICC Master Code Professionals in Utah which he received in 2009.

Work Experience

2014-Present  West Coast Code Consultants, Inc.
Senior Inspector / Senior Plan Reviewer

Oversee the plan review and building inspection services provided by the Utah West Jordan Regional Office. This includes the management of administrative, plan review, and inspection staff. Accountable for the complete plan review of projects which are seeking a building permit to ensure that designs are safe and in compliance with the adopted building codes.

2005-2014  Forsgren Associates
Senior Inspector / Plan Reviewer / Building Official

Worked as the contract Building Official in Holladay City and the Town of Alta Utah for over five years. As the contract building official he gained extensive municipality experience completing implementation, development of policies, and procedures. In addition he acted as the lead inspector and lead plan reviewer for hundreds of projects.

Education

Master of Science
Construction Management
Brigham Young University, 2015

Bachelor of Science
Construction Management
Weber State University, 2006

Associate of Science
Mechanical Engineering Tech
Manufacturing Engineering
CAD/CAM Engineering Tech
Salt Lake Community College, 2005

Professional Affiliations

Member of ICC
Member of IAEI
Background

Mr. Talat Abbasi, P.E. has nearly four decades of experience as a structural designer and plans examiner. He has performed over ten thousand plan reviews, including residential single-family construction, complex multi-story buildings of residential, commercial, office, medical and industrial uses. He has also reviewed specialized structures (such as bridges, towers, power plants and high-rises) and provided peer reviews for larger projects on construction techniques. Mr. Abbasi holds a Bachelor of Engineering degree in Civil Engineering from Sind University Engineering College and a Master of Science degree in Civil Engineering from California State University, Sacramento.

Work Experience

2016-Present  **West Coast Code Consultants, Inc.**  Senior Professional Engineer

Mr. Abbasi completes plan review services provided by the South San Francisco and San Ramon Regional Offices. He is accountable for the complete plan review of projects which are seeking a building permit to ensure that designs are safe and in compliance with the adopted building codes. His extensive experience makes him a valuable resource to the team.

2006-2016  **Shumscoda Associates**  Partner

Acted as one of the partners and was responsible for helping different building departments of Cities in Northern California, such as Milpitas, Mountain View, Santa Clara, Sunnyvale, Palo Alto, Dublin, Danville, Redwood City among others in their Structural Plan Checking process. Some of the many large projects which were personally reviewed for structural design and detailing per ICC Code are Triton Plaza (Foster City), San Antonio Center (Mountain View), Sunnyvale Town Center (Sunnyvale), One Marina (Redwood City), DeVeres Senior Housing (Milpitas), Centria East & West (Milpitas), Paragon (Milpitas), 800 High Street (Palo Alto), 145 Monroe (Redwood City). Have performed over ten thousand structural plan reviews, including residential single-family construction, complex multi-story buildings of residential, commercial, office, medical and industrial uses. have also reviewed specialized structures (such as bridges, towers, power plants and high-rises) and provided peer reviews for larger projects on construction techniques. Have been Principal in charge of all structural plan reviews, as well as the primary contact for all structural related plan review services.

1996-2006  **LP2A Inc.**  Senior Associate

Performed Worked as Senior Associate completing structural design review per ICC and of some famous projects such as Santana Row (San Jose & Milpitas), Adobe High Rise (San Jose), Nuvumi Plant (Fremont), and some of the many large projects are listed here are Ritz Carlton (Half Moon Bay), Thomas Berkeley Square (Oakland), Sierra Suites @ Rivermark Plaza (Santa Clara), and fifty (50) buildings of Cisco Systems Inc. and many more.

1992-1996  **Wildan Associates**  Plan Check Engineer

Worked as Plan Check Engineer on high profile buildings such as Nuvumi Inc, Military Research Project (Dublin) and many small and larger projects.

1980-1992  **DES Inc.**  Design Engineer

Worked as a design engineer and did structural design of several tilt up buildings used as offices and ware houses. Worked on custom homes and prepared and designed custom homes for clients. After several years of design experience was transferred to plan checking department of DES.
Marcus Johnson  
Senior Inspector and Plans Examiner

Background

Mr. Johnson carries comprehensive experience as an ICC certified senior level inspector. His experience encompasses the more complex plan review and field inspections of building construction, plumbing, mechanical and electrical installations in residential and commercial buildings. He is extremely knowledgeable of required compliance with applicable building, plumbing, electrical, mechanical codes, and applicable jurisdictional ordinances, state, and local statutes. He communicates successfully with property owners, contractors and developers in the process of field inspections, thoroughly understanding the construction process and the need for speedy project completion in conjunction with accurate compliance.

Work Experience

2015-Present  West Coast Code Consultants, Inc.  
Senior Plans Examiner, Senior Inspector  
Provides client services for jurisdictional clients encompassing plan review, inspection services.

2012-2015  County of Napa  
Building Inspector 3  
Performed the more complex field inspection of building construction, plumbing, mechanical and electrical installations in residential and commercial buildings; verify compliance with applicable building, plumbing, electrical, mechanical codes, and related City ordinances, state, and local statutes. Communicated with property owners, contractors and others in the process of field inspections, explained requirements, compliance with plans and codes with final sign-off approval. Performed code enforcement work, including investigating code violations and complaints; writing up the results of inspections; issued instructions with recommendations; with research of information; issued stop work orders.

2005-2012  City of Hesperia  
Building Inspector, Plans Examiner  
Reviewed plans and issued building permit applications for new construction, alterations, and remodeling of existing structures; verified compliance with applicable codes and ordinances and accepted construction practices; and, issued certificates of occupancy. Provided technical information and professional advice to City staff, officials and the public regarding City codes relating to construction; assists architects, residential designers, engineers, contractors and property owners in interpreting and meeting code requirements; established and maintains a customer service orientation; responds to complaints and resolves more difficult inspection problems.

2005-2008  JAS Pacific  
Permit Technician  
Reviewed plans and building permit applications for new construction, alterations, and remodeling of existing structures; verified compliance with applicable codes and ordinances and accepted construction practices; and, issues certificates of occupancy. Acted as project coordinator for routing of plans, tracking status of plans while they are being checked by staff in other City divisions.
Background

Mr. Olsen is certified as a combination building, plumbing, electrical, & mechanical inspector, as well as a certified permit technician providing services to jurisdictional clients. He is skilled at providing technical support and information to homeowners, developers and contractors regarding building department processes and procedures, code compliance, and building standards. He has experience performing inspections during all phases of construction including large scale industrial power plants. He is a skilled troubleshooter, is results oriented, and delivers strong customer service skills and the ability to work collaboratively with members of any jurisdictional team. He has a proven track record with an ability to maintain expert level communication skills with clients, craftsmen, contractors and government agencies to deliver projects on time, on budget and to successful completion.

Work Experience

**West Coast Code Consultants, Inc.**

*Building Inspector*

2015-Present

Mr. Olsen has been a full time inspector in various jurisdictions throughout the Sacramento Valley and the Bay Area, including Calaveras County, Hayward, and El Cerrito. His proven track record and ability to maintain expert communication skills with clients, craftsmen, contractors and government agencies; makes him a valuable asset.

**Building Inspector / Energy Inspector**

2013-2015

Mr. Olsen has been a full time inspector on California Energy Commission power generation facilities. His project experience includes LMS-100 Combustion Turbine Generators (CTGs). Bringing projects in on time and to successful completion makes him a clear choice for both large scale projects as well as smaller residential projects.

**Permit Technician**

2012-2013

Performed front counter support as a permit technician for in Sausalito. Responsible for maintaining and organizing counter area. Able to review specifications, sketches, and architectural plans of buildings to be constructed, altered, repaired, etc., for conformance with appropriate local and state codes and ordinances, then direct applicants of procedures for submittal to obtain permit issuance.

**Burlington Coat Factory Warehouse**

*Trouble Liaison*

2011-2012

Assist receiving departments with identifying and researching any troubled freight. Once identified, record the freight into rCMS and note pertinent information in WMS. Responded to inquiries, organizes and maintains record keeping systems.

**Rocket Learning**

*Data Entry Assistant*

2010-2011

Lead a small team of 6 in an effort to inform parents about educational opportunities. Experience in the operation of personal computers and data entry, communicates effectively orally and in writing using correct spelling, grammar, and punctuation; and is experienced using math. Assist tutors with providing exceptional educational services.
ATTACHMENT A

Harvey Higgs, CBO
Building Official, Senior Combination Building Inspector

Background

Mr. Higgs carries valuable, dual experience from longtime management and in-the-field jurisdictional work. As a building official as well as an ICC certified inspector and plans examiner he understands the overall requirements of a project bringing exhaustive code knowledge in combination with practical application to every project. He is skilled at successfully working with all stakeholders throughout the beginning phases of construction to completion. Current experience includes the Vintage Village project in the City of Pleasanton.

Work Experience

2014-Present  West Coast Code Consultants, Inc.
Senior Building Inspector/Plans Examiner/Interim Building Official
Performs residential and construction inspections for projects and client jurisdictions as well as plan review. Serves as interim building official. Past experience includes serving as interim building official for the City of South San Francisco and lead project inspector for the Vintage Village project in the City of Pleasanton.

2001-2012  City of Benicia  Building Official
Performed building official duties including code interpretation of the building and electrical codes, non-structural plan review. Managed all duties of the building division including working with home owners, contractors, developers to facilitate permit submittal and final approval as well as coordinated with all City departments. Duties also required inspection of commercial and residential construction and plan review.

1988-2001  City of Benicia  Building Inspector I, II and III
Provided inspections for residential and commercials projects. Moved up from building inspector to building official.

1982-1988  Cities of Upland, Dixon and County of Yolo  Building Inspector
Provided inspections for residential and commercials projects.
Background

Mrs. Birdon is an ICC Certified licensed Permit Technician. She is also the Document Controller for the Energy Projects such as (Apple Campus 2, Blythe Solar Power Project, Carlsbad Energy Center Project, Pio Pico Energy Center and Orange Grove Energy Project) in progress. She received her Certification for Permit Technician in 2007 from International Code Council. She has performed excellent Customer service on thousands of projects throughout the California.

Work Experience

2015-Present

**West Coast Code Consultants, Inc. Permit Tech/Document Controller**

Document control for various projects (i.e Apple Campus, Carlsbad Energy Center Project, Blythe Solar Power Project, Pio Pico Energy Center and Orange Grove Energy Project). Data entry, Input documents into our internal portal for review and approval. Create and process approval letters or comments to be addressed. Stamp and upload approved documents to the portal. Perform Permit technician duties for different jurisdictions. Performs public counter work; provides information and direction in person and over the telephone to the public on building issues, applicable local and state and federal engineering and building codes, ordinances, documents, standards and guidelines, reviews routes and processes and checks minor applications and permits; reviews applications, documents and plan submittals to ensure accuracy.

2014-2015

**Bureau of Veritas**

Permit Technician

Performs public counter work; provides information and direction in person and over the telephone to the public on building issues, applicable local and state and federal engineering and building codes, ordinances, documents, standards and guidelines, reviews routes and processes and checks minor applications and permits; reviews applications, documents and plan submittals to ensure accuracy.

2013-2015

**TeleDirect Call Center**

Customer Service Rep 1

Answer incoming calls, assist callers with account information, applicants with scheduling one on one appointments for Health Markets Insurance Company to make sure they find the right coverage, process payments on customers account, order supplies, various other clerical duties.

2007-2010

**City of West Sacramento**

Permit Technician

Performs public counter work; provides information and direction in person and over the telephone to the public on building issues, applicable local, state and federal engineering and building codes, ordinances, documents, standards and guidelines, processes and requirements; receipts, reviews, routes, processes and checks minor applications and permits; reviews applications, documents and plan submittals to ensure accuracy and compliance with pertinent laws and established criteria; issues building permits; verifies that required permits licenses and insurancees have been obtained; calculates processing and mitigation fees with the Finance Department; provides information to the public relating to the status of projects and permits; prepares reports. Memoranda and letter compiles and analyzes data for special projects and various reports; receives requests for building inspections, enters inspection data prepares field inspection records.
PROFESSIONAL SERVICE FEES
FOR ON-CALL BUILDING PLAN REVIEW AND INSPECTION SERVICES, ENGINEERING PLAN REVIEW
RFP NUMBER PUR 17-001

PREPARED FOR THE:
CITY OF STOCKTON

CONTACT INFO
Michael Renner
916.794.6222
MikeR@wc-3.com
## SERVICE FEES

Professional Service Fees

WC proposes the following fees based on a percentage of the plan review fees:

<table>
<thead>
<tr>
<th>Classification</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Building Plan Review</td>
<td>65%</td>
</tr>
<tr>
<td>Structural Only Plan Review</td>
<td>45%</td>
</tr>
<tr>
<td>Architectural Only Plan Review</td>
<td>40%</td>
</tr>
</tbody>
</table>

### Schedule of Hourly Billing Rates

<table>
<thead>
<tr>
<th>Classification</th>
<th>Hourly Billing Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structural Engineer</td>
<td>$125.00</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$115.00</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$110.00</td>
</tr>
<tr>
<td>Building Official</td>
<td>$130.00</td>
</tr>
<tr>
<td>Plans Examiner</td>
<td>$100.00</td>
</tr>
<tr>
<td>Fire Plans Examiner</td>
<td>$105.00</td>
</tr>
<tr>
<td>Fire Protection Engineer</td>
<td>$115.00</td>
</tr>
<tr>
<td>CAS Plan Reviewer/Inspector</td>
<td>$150.00</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review</td>
<td>$100.00</td>
</tr>
<tr>
<td>Senior Inspector</td>
<td>$99.00</td>
</tr>
<tr>
<td>Inspector III</td>
<td>$94.00</td>
</tr>
<tr>
<td>Inspector II</td>
<td>$89.00</td>
</tr>
<tr>
<td>Inspector I</td>
<td>$79.00</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$65.00</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>$55.00</td>
</tr>
<tr>
<td>Instructor (In House Staff Training)</td>
<td>Starting at $750/Class</td>
</tr>
<tr>
<td>Overtime on Hourly Rates (if required)</td>
<td>150% of Hourly Rate</td>
</tr>
</tbody>
</table>

* Four (4) Hour minimum on all in house work

Plan review services include an initial review, second review and a third review (if needed) for approval of the plans. Any additional time required beyond the third plan review will be billed on an hourly basis, with prior approval by the City, per the Schedule of Hourly Billing Rates (see left).

Pick-up and delivery fees are not charged to the City but processed through WC's established account. Preliminary plan reviews, review of revisions after a project has been approved, review of shop drawings, and review of deferred submittals will be completed on an hourly basis with a mutually acceptable not-to-exceed amount.

For expedited or fast-track projects requested by the City of Stockton, we propose a fee of 150% of the above noted fees.
Resolution No. 2017-06-20-1103

STOCKTON CITY COUNCIL

RESOLUTION AUTHORIZING THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

Development is cyclical, and during an improving economy the demand for building plan review and inspection services can outpace staffing levels; and

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods; and

On March 29, 2017, a Request For Qualifications (RFQ) for development related Building Plan Check, Inspection and Engineering on-call services was posted to the City's Bid Flash web page in order to develop a pool of qualified firms (PUR 17-001); and

RFQs were reviewed by an evaluation panel consisting of three CDD staff and selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service and total hourly cost rate to the City; and

Four out of the five firms were recommended for the pool as follows: 4LEAF, Inc. Fair Oaks, CA; CSG Consultants, Inc., Sacramento, CA; Bureau Veritas North America, Inc., Sacramento, CA; and West Coast Code Consultants, Inc., San Ramon, CA; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. The "Professional Services Master Agreement," attached hereto as Exhibit 2 and incorporated by this reference, between the City of Stockton and each of the following firms is hereby authorized and approved for the establishment of a Vendor Pool:

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

Firm qualifications, staffing plans, and standard hourly rates schedules are found in Exhibit 1, which is also attached and incorporated by this reference.
2. The City Manager is hereby authorized and directed to execute the Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.

3. The City Manager is hereby authorized to enter into amendments to the Professional Services Master Agreement with each of the firms in the vendor pool in a total amount not to exceed $480,000 across all vendors.

4. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED June 20, 2017

ATTEST:

MICHAEL D. RUBBS
Mayor of the City of Stockton

BONNIE PAIGE
City Clerk of the City of Stockton
AUTHORIZE THE EXECUTION OF A PROFESSIONAL SERVICES MASTER AGREEMENT TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES (PUR 17-001)

RECOMMENDATION

It is recommended that the City Council adopt a resolution to authorize the City Manager to:

1. execute a Professional Services Master Agreement with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureua Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. execute amendments to the Professional Services Master Agreement for individual projects in an amount not to exceed $480,000 across the entire vendor pool; and

3. authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the resolution.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. The Community Development Department (CDD) is completing multi-year forecasts and staffing to the lowest estimated need in the upcoming years. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as specialized staff availability for unique or very complicated projects.

Therefore, staff recommends Council adopt a resolution to authorize the City Manager to execute a Professional Services Master Agreement with four professional firms as detailed above for an initial three-year term with an option to extend the agreement for
up to two additional one-year periods. Costs associated with the Professional Services Master Agreement are covered by fees collected from each project applicant before plan reviews or inspections are conducted. Compensation under the proposed agreement is limited to a cumulative amount of $480,000 for all vendors.

**DISCUSSION**

**Background**

As part of the current fiscal year budget development and adoption, a combination of modest staffing increases and use of consulting services was determined to be the most responsible way to address increasing development activity and increased demand for Building Division activities such as plan check (building, engineering, and backup fire plan check), inspection, counter staffing and flood plain management. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring permanent specialist staff.

There has been a rapid increase in development project valuation in the City of Stockton over the last several years as the market continued an upward trend that resulted in increased planning and building permit activity and economic growth. Below, by fiscal year, are building permit valuations for recent fiscal years:

- FY 2012-13: $121 million
- FY 2013-14: $141 million
- FY 2014-15: $215 million
- FY 2015-16: $315 million
- FY 2016-17: $275 million (Projected)

Permit valuation has largely increased due to the volume, type, and complexity of projects as the economy improves. Although projected valuation for FY 2016-17 is expected to dip from that of FY 2015-16, valuations remain robust. Therefore, the CDD plans to continue to utilize consultants to provide the necessary flexibility to respond to cyclical demand, assist when full-time staff shortages occur, and provide specialized knowledge or training when required.

This affords the department the ability to quickly change the scale and scope of staffing support levels to correspond to workload needs at any time while maintaining high levels of customer service. Fees are collected from the applicant before any plan review, or inspection services are performed. Maintaining a pool of multiple firms provides the department the flexibility to select the appropriate consultant based on the specific project-related work and the availability of staff.

The CDD currently maintains two contracts for on-call services (building inspectors and plan checkers, permit technicians, licensed engineers, and certified building officials). Under the existing contracts 4LEAF invoices to date are $281,688.23 and CSG invoices
to date are $260,858.13 (69% expended). Each firm was used based on ability to provide qualified, experienced staff at the time of the City’s request. These contracts were originally approved in Fiscal Year (FY) 2015-16 for two years and expire on June 30, 2017. Due to an improving economy and the tightening of the labor pool in specialized building services, having a Professional Services Master Agreement with four consultants will allow the City to provide a better spectrum of services and enable the department to respond to short-term increases in building activity, staff vacancies, and adhere to established timelines, policies, and legal requirements.

Present Situation

On March 29, 2017, a Request For Qualifications (RFQ) was posted to the City’s Bid Flash web page. Five RFQ submittals were received on April 20, 2017, from the following vendors:

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- EsGil Corporation, a SAF EBuilt Company, Loveland, CO
- West Coast Code Consultants, Inc., San Ramon, CA

An evaluation panel consisting of three CDD staff reviewed the submissions and recommended four out of the five The selection was based on the strength of the proposals, experience with the work required, understanding of Stockton Municipal Code and State Code, ability to provide quality control checks, qualified staff, customer service, and the total hourly rate cost to the City. The pool of consultants will provide additional coverage for City service demands, and to allow a larger pool of selected consultants the opportunity to complete City work.

The Professional Services Master Agreement will apply to all four firms for services over a three (3) year period, on an as-needed basis, with the total aggregate compensation paid to all four firms not to exceed $480,000 (Exhibit 2 to the Resolution - Professional Services Master Agreement). Each selected firm’s statement of qualifications, proposed staffing, and standard rate schedule for services, are included in Exhibit 1 to the Resolution.

Once the Master Agreement is in place, firms can be selected from the pool to perform work specific to each project. Project specific scope of work and fees for professional services will be submitted from the selected firms. Final scope of work and fees will be adopted via an amendment to the Professional Services Master Agreement on a project-by-project basis.

This level of contract capacity will allow the department to adjust resources as necessary to provide high quality, timely work. The CDD continues to implement process improvements while monitoring workload and demand to ensure that full-time and contract staffing levels are appropriately balanced, re-evaluating these needs
annually. Authorizing the City Manager to execute the Professional Services Master Agreement, and establish the pool will allow the CDD to continue to meet service delivery goals in an efficient, timely, and professional manner.

FINANCIAL SUMMARY

Funding for the Professional Services Master Agreement is included in the proposed FY 2017-18 budget for $320,000. The remaining portion of $160,000 is expected to be appropriated in the FY 2018-19 fiscal year budget and funded from the same account.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Project Code</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2017-18</td>
<td>048-1830-530.20-66</td>
<td>$320,000</td>
</tr>
<tr>
<td>FY 2018-19</td>
<td>048-1830-530.20-66</td>
<td>$160,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>$480,000</td>
</tr>
</tbody>
</table>
Insurance Requirements for Professional Services

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

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

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

2. **Automobile Liability**: Insurance Services Office Form Number CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than $1,000,000 per accident for bodily injury and property damage.

3. **Workers' Compensation** insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than $1,000,000 per accident for bodily injury or disease. *(Not required if consultant provides written verification it has no employees)*

4. **Professional Liability (Errors and Omissions)** Insurance appropriate to the Consultant's profession, with limit no less than $2,000,000 per occurrence or claim, $2,000,000 aggregate. *(If Claims-made, see below.)*

If the Consultant maintains higher limits than the minimums shown above, the City of Stockton requires and shall be entitled to coverage for the higher limits maintained by the consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City of Stockton.

**Other Insurance Provisions**

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status
The City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers are to be covered as additional insureds on the CGL policy and AL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant’s insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37 forms if later revisions used).

Primary Coverage
For any claims related to this contract, the Consultant’s insurance coverage shall be endorsed as primary insurance as respects the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers. Any insurance or self-insurance maintained by the City of Stockton, its Mayor, Council, officers, representatives, agents, employees and volunteers shall be excess of the Consultant’s insurance and shall not contribute with it. The City of Stockton does not accept endorsements limiting the Consultant’s insurance coverage to the sole negligence of the Named Insured.

Notice of Cancellation
Each insurance policy required above shall state that coverage shall not be canceled, except with notice to the City of Stockton.

Waiver of Subrogation
Consultant hereby grants to City of Stockton a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City of Stockton by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City of Stockton has received a waiver of subrogation endorsement from the insurer.

Deductibles and Self-Insured Retentions
Any deductibles or self-insured retentions must be declared to and approved by the City of Stockton Risk Services. The City of Stockton may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

Acceptability of Insurers
Insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A:VII if admitted to do business in the State of California; if not admitted to do business in the State of California, insurance is to be placed with insurers with a current A.M. Best’s rating of no less than A+:X.
Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

2. If Claims Made policy form is used, a three (3) year discovery and reporting tail period of coverage is required after completion of work.

Verification of Coverage
Consultant shall furnish the City of Stockton with original certificates and amendatory endorsements required by this clause. All certificates and endorsements are to be received and approved by the City of Stockton Risk Services before work commences. Failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The City of Stockton reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time, for any reason or no reason.

Consultant shall, prior to the commencement of work under this Agreement, provide the City of Stockton with a copy of its Declarations Page and Endorsement Page for each of the required policies.

Certificate Holder Address
Proper address for mailing certificates, endorsements and notices shall be:

- City of Stockton
- Attention: Risk Services
- 425 N El Dorado Street
- Stockton, CA 95202

City of Stockton Risk Services Phone: 209-937-5037
City of Stockton Risk Services Fax: 209-937-8558

Maintenance of Insurance
If at any time during the life of the Contract or any extension, the Consultant fails to maintain the required insurance in full force and effect, all work under the Contract shall be discontinued immediately. Any failure to maintain the required insurance shall be sufficient cause for the CITY to terminate this Contract.

Subcontractors
Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City of Stockton is an additional insured on insurance required from subcontractors.
Special Risks or Circumstances
City of Stockton reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.
MEMORANDUM

June 26, 2017

TO: Kurt O. Wilson, City Manager
FROM: David Kwong, Director

SUBJECT: PROFESSIONAL SERVICES MASTER TO ESTABLISH A POOL OF QUALIFIED PROFESSIONAL SERVICES FIRMS FOR ON-CALL CONTRACT SUPPORT FOR BUILDING PLAN REVIEW AND INSPECTION, ENGINEERING PLAN REVIEW, AND FLOODPLAIN MANAGEMENT SERVICES

On June 20, 2017 the above item was approved by City Council by resolution number 17-06-20-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document(s).

[Signature]
DAVID KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DK:mm

Attachments
CONTRACT ROUTING FORM

ATTACHMENT A

RECEIVED
City Manager's Office
City of Stockton

Contract Number 2017-06-20-1103-03-NP
(For Clerk's Use)

CONTRACT TYPE (select one)
☐ Original  ☐ Amendment/Renewal/Change Order  ☐ Grant
☐ Subdivision Agreement  ☐ Other

CONTRACT INFORMATION
Contract Amount: $480,000

Contract Title: Professional Services Master Agreement to establish vendor pool for on-call Building Plan Check, et al.
Vendor/Other Party: 4LEAF, Bureau Veritas, CSG Consultants, West Coast Code Consultants (WC3)
Contract Start Date: July 10, 2017  Contract End Date: June 30, 2020  Contract Term: 3-Yrs (2) 1-year ext.

COUNCIL APPROVAL REQUIRED? ☐ Yes ☐ No (provide account # if no)
Council approval required for contracts over $75,000 for FISCAL YEAR 2017-18
Motion/Resolution/Ordinance No: 17-06-20-1103 Must be Attached ☐

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):
Business License Required? ☐ Yes ☐ No  Business License No. 4LEAF 18 00078218 BY 18 00127671
Bonds Required? ☐ Yes ☐ No  CSG 18 00114727  WC3 18 00127495
Insurance Required? ☐ Yes ☐ No  Recodartion Required? ☐ Yes ☐ No
Notary Required? ☐ Yes ☐ No

Routing Order
1. DEPARTMENT: CDD
 DEPARTMENT HEAD APPROVAL
Project Mgr: Mark Martin  ext: 8544  Staff: Jobi Adams  ext: 8564
Forwarded to: Raeann Cycenas  on: 6/26/2017  by: Mark Martin

VENDOR/OTHER PARTY
Signed (2) originals on: 6/16/17  Forwarded to: MARK MARTIN  on: 6/16/17  by: BUREAU VERITAS

2. RISK SERVICES
Insurance approved on: 7-5-17  by: JHJ Bonds approved on: 7-15/17  by: WM
Forwarded to: Lori Asuncion  on: 7/15/17  by: WM

3. CITY ATTORNEY
Approved as to Form and Content on: 7-8/17  by: HK  on: 7-5-17  by: RH
Forwarded to: Scott Carney

4. CITY MANAGER
Signed by City Manager on: 7-19/17  Forwarded to: Clerk  on: 7-19/17  by: AG

5. CITY CLERK
City Clerk attested on: 7-24-17  Returned (1) original(s) to dept. on: 7-24-17  by CM
Retained (1) original(s) for City's file. Hard copy on file? ☐ Yes ☐ No ☐ OB

6. ORIGINATING DEPARTMENT:
Requisition No.  1103  Original sent to vendor on: 7-24-17  by:
Copy of contract to be retained by department. Original on file in the Clerk's office.
Copy of contract sent to Purchasing on: 7-24-17  by:

PURCHASING: Purchase Order No.  PUR No.
AMENDMENT TO PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AMENDMENT TO Professional Services Master Agreement is made and entered into this 27th day of June 2018, between the CITY OF STOCKTON, a municipal corporation ("City"), and 4LEAF, Inc., a California "C" Corporation whose address is 8896 N Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Vertias North America, Inc., a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-420, ("Consultant"), and CSG Consultants, Inc., a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc., a California "S" Corporation whose address is 2400 Camino Ramon, Suite 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

WHEREAS, the Parties entered into a Professional Services Master Agreement for on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management on July 25, 2017 ("Original Agreement"), pursuant to Resolution 2017-06-20-1103, as part of a vendor pool and desire to amend said Agreement, and

WHEREAS, the Original Agreement approved compensation for services and reimbursable expenses in an amount not to exceed Four Hundred, Eighty Thousand Dollars ($480,000.00) total across all Consultants; and

WHEREAS, the services provided for under this Agreement are vital to functions carried out by the Community Development Department; and

WHEREAS, due to an unforeseen increase in economic growth, the City and Consultant previously approved compensation will not support the increased building services work demand; and

WHEREAS, the City and Consultant now wish to update the Original Agreement, due to this unanticipated construction intensification, by entering into an Amended Professional Services Master Agreement and raise the compensation to One Million Dollars ($1,000,000.00) total across all Consultants.

NOW, THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:

COS and Professional Services Master Agreement Amendment
1. Section 4: Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Dollars ($1,000,000.00), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America, Inc.), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

2. All other terms and conditions of the said original Professional Services Master Agreement shall remain unchanged and in full force and effect unless modified in writing by both parties.
IN WITNESS WHEREOF, the parties have caused this Amendment to the Professional Services Master Agreement to be executed on the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

KEVIN J. DUGGAN, PRESIDENT

G defiance, 9 BARRY, VICE PRESIDENT

CIGG CONSULTANTS, INC.

CYRUS KIANPOUR, PRESIDENT

CHARELS D. RIVER, SECRETARY

ATTEST:

BRET HUNTER, ECS.
INTERIM CITY CLERK

4LEAF, INC.

CRAIG BAPTISTA, OPERATIONS DIR.

ANDREA COLEY

BUREAU VERITAS NORTH AMERICA, INC.

WEST COAST CODE CONSULTANTS, INC.

GIYAN SENERATNE, PRESIDENT

CHRIS ROSE, OPERATIONS MGR.

APPROVED AS TO FORM:

JOHN LUEBBERKE
CITY ATTORNEY

COS and Professional Services Master Agreement Amendment
Resolution No. 2018-06-05-1103

STOCKTON CITY COUNCIL

RESOLUTION APPROVING AN AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, City Council approved a three-year Professional Services Master Agreement with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services and

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies; and

The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public; and

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19; and

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17; and

Staff estimates a need for an additional $500,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. Council approves an amendment to the "Professional Services Master Agreement," between the City of Stockton and each of the following firms, already authorized and approved for the establishment of a Vendor Pool, to increase the overall contract amount by $520,000 bringing the total amount to $1,000,000.

   a. 4LEAF, Inc, Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

2. The City Manager is hereby authorized and directed to execute the Amended Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.
3. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED _______ June 5, 2018 _______.

MICHAEL D. TUBBS
Mayor of the City of Stockton

ATTEST:

BRET HUNTER, CMC
City Clerk of the City of Stockton
AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

RECOMMENDATION

It is recommended that the City Council adopt a resolution to:

1. Authorize the City Manager to execute an Amendment to Professional Services Master Agreement 2017-06-20-1103-NP to increase the overall contract amount by $520,000, bringing the total to $1,000,000 for the three-year contract term; and

2. Authorize the City Manager to take appropriate and necessary actions to carry out the purpose and intent of this resolution.

Summary

On June 20, 2017, the City Council approved a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP). Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. A combination of modest staffing increases and additional contracted services was included in the FY 2016-17 budget, and proposed again in the FY 2016-19 budget.

The increased development activity exceeded prior estimates and current resources are insufficient to manage the additional workload. More contracted services are recommended to maintain the current service levels for the remainder of the contract, which ends July 25, 2020. The contract limit would be increased by $520,000 for a revised three-year compensation limit of $1 million. The original contract was awarded following an open Request for Qualifications process and four firms were selected to provide on-call services. Staff recommends adoption of the proposed resolution to address the workload associated with increased development activity.

DISCUSSION

Background

As part of the fiscal year 2016-17 budget, a combination of modest staffing increases and consulting services was determined to be the most responsible way to address increased development activity and increased demand for the Community Development Department. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring
permanent specialist staff. The combination of modest staffing increases and contracted services is also recommended in the FY 2018-19 budget to address the workload associated with continued development activity increases.

City Council approved a three-year Professional Services Master Agreement on June 20, 2017, with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services.

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- West Coast Code Consultants, Inc., San Ramon, CA

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies. The agreement structure is an integral part of providing high-level services to the public. The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public.

**Present Situation**

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19. This original amount averaged to $13,333 per month. Currently, using the highest rate charged for services by any of the vendors in the past four months, the estimated average is approximately $27,000 per month.

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17 (Table 1.). This increase in construction activity required a corresponding increase in the number of building inspection stops. To address the increase in permit activity and inspections needed, especially during this peak period, staff utilized contract services for plan reviews and inspections at a higher than expected rate to supplement city staff. The staff is projecting a need for an additional $520,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term to address this higher peak level of permit activity and meet customer needs.

**Table 1.**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Valuation</th>
<th>Annual Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 - 14</td>
<td>$153 million</td>
<td></td>
</tr>
<tr>
<td>2014 - 15</td>
<td>$212 million</td>
<td>39.0%</td>
</tr>
<tr>
<td>2015 - 16</td>
<td>$306 million</td>
<td>44.5%</td>
</tr>
<tr>
<td>2016 - 17</td>
<td>$334 million</td>
<td>9.2%</td>
</tr>
<tr>
<td>2017 - 18</td>
<td>$411 million (as of April 30)</td>
<td>23.0%</td>
</tr>
<tr>
<td></td>
<td>$500+ million (estimate for end of FY)</td>
<td></td>
</tr>
</tbody>
</table>
FINANCIAL SUMMARY

This is a 3 year contract and the annual costs are displayed in the table below. There is sufficient budget allocated in FY 2017-18 and planned for FY 2018-19 in the proposed budget to cover the first 2 years of the contract. Final year (FY 2019-20) appropriation will be budgeted through the annual budget process.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Budget Allocation Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2017-18</td>
<td>Building Division (048-1830-510)</td>
<td>$320,000</td>
</tr>
<tr>
<td>FY 2018-19</td>
<td>Building Division (048-1830-510)</td>
<td>$400,000</td>
</tr>
<tr>
<td>FY 2019-20</td>
<td>Building Division (048-1830-510)</td>
<td>$280,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,000,000</td>
</tr>
</tbody>
</table>

Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP
Attachment B - Amendment Master On-Call Building Professional Services Agreement
MEMORANDUM

June 11, 2018

TO: Kurt O. Wilson, City Manager

FROM: David W. Kwong, Director

SUBJECT: CONTRACT CHANGE ORDER #1 - PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 5, 2018, the above item was approved by City Council by resolution number 2018-06-05-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document.

__________________________  6/11/18
DAVID W. KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DK:mf

Attachments: Amendment To Professional Services Master Agreement
Professional Services Master Agreement

APPROVED BY:

__________________________
KURT O. WILSON, CITY MANAGER
CITY OF STOCKTON
Hi Esther,

Find below the information requested in response to your voice message. Let me know if you have any questions or concerns.

CSG – 19-00114727 (expires 4/30/19)
BV – 19-00127671 (expires 6/30/19)
WC3 – 19-00127495 (expires 4/30/19)
4Leaf – 19-00078218 (expires 3/31/19)

Thank you,
Makinde Falade
Program Manager III

CITY OF STOCKTON
Community Development Department
(209) 937-7567

"Intellectuals solve problems; geniuses prevent them"
Albert Einstein
ATTACHMENT B

CONTRACT ROUTING FORM

Contract Number: 2017-06-20-1103-NP  Amendment

CITY CONTRACT TYPE (select one)
- Original
- Amendment/Change Order
- Grant
- Subdivision Agreement
- Other

CONTRACT INFORMATION
- Contract Amount: $1,000,000
- Contract Title: PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICE
- Vendor/Other Party: 4Leaf CSB; Bureau Veritus; WestCoast Code Consultants
- Contract Start Date: July 19, 2017
- Contract End Date: June 30, 2020
- Contract Term: 3 years

COUNCIL APPROVAL REQUIRED?  Yes  No (provide account # if no)
- Council approval required for contracts over $75,000
- Motion/Resolution/Ordinance No: 2018-06-05-1103  Must be Attached

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):
- Business License Required?  Yes  No
- Business License No. CSB 19-00114727
- Bonds Required?  Yes  No
- Bonds approved on: 6/18/18 by: MBS
- Insurance Required?  Yes  No
- Insurance approved on: 6/18/18 by: CBS
- Notary Required?  Yes  No
- Recorderation Required?  No

Mandatory Routing Order

1. DEPARTMENT: CDD
   - Project Mgr: Makinde Faleide
   - Forwarded to: Procurement

2. PROCUREMENT
   - Approved by: Matt Risk
   - Forwarded to: CDD

3. VENDOR/OTHER PARTY
   - Signed (✓) 1 originals on:
   - Forwarded to:

4. RISK SERVICES
   - Insurance on: 6/18/18 by: MBS
   - Bonds approved on: 6/18/18 by: CBS
   - Forwarded to:

5. CITY ATTORNEY
   - Approved as to Form and Content on: 6/20/18 by: Gilliland
   - Forwarded to:

6. CITY MANAGER
   - Signed by City Manager on:
   - Forwarded to: Clerk

7. CITY CLerk
   - City Clerk attested on: 6/28/18
   - Returned (1 original(s) to dept. on: 6/28/18 by:
   - Retained (1 original(s) for City's file. Hard Copy on file? Yes  No

8. ORIGINATING DEPARTMENT:
   - Requisition No.
   - Original sent to vendor on:
   - Copy of contract to be retained by department. Original on file in the Clerk's office.
   - Copy of contract sent to Purchasing on:

9. PROCUREMENT: Purchase Order No.  PUR No.

[Signature]
[Date: 6/18/18]
AMENDMENT TO PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AMENDMENT TO Professional Services Master Agreement is made and entered into this 27th day of June 2018, between the CITY OF STOCKTON, a municipal corporation ("City"), and 4LEAF, Inc., a California "C" Corporation whose address is 8896 N Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Vertias North America, Inc., a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-420, ("Consultant"), and CSG Consultants, Inc., a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc., a California "S" Corporation whose address is 2400 Camino Ramon, Suite 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

WHEREAS, the Parties entered into a Professional Services Master Agreement for on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management on July 25, 2017 ("Original Agreement"), pursuant to Resolution 2017-06-20-1103, as part of a vendor pool and desire to amend said Agreement, and

WHEREAS, the Original Agreement approved compensation for services and reimbursable expenses in an amount not to exceed Four Hundred, Eighty Thousand Dollars ($480,000.00) total across all Consultants; and

WHEREAS, the services provided for under this Agreement are vital to functions carried out by the Community Development Department; and

WHEREAS, due to an unforeseen increase in economic growth, the City and Consultant previously approved compensation will not support the increased building services work demand; and

WHEREAS, the City and Consultant now wish to update the Original Agreement, due to this unanticipated construction intensification, by entering into an Amended Professional Services Master Agreement and raise the compensation to One Million Dollars ($1,000,000.00) total across all Consultants.

NOW, THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:
1. Section 4: Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Dollars ($1,000,000.00), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America, Inc.), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

2. All other terms and conditions of the said original Professional Services Master Agreement shall remain unchanged and in full force and effect unless modified in writing by both parties.
IN WITNESS WHEREOF, the parties have caused this Amendment to the Professional Services Master Agreement to be executed on the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

KEVIN J. DUGGAN, PRESIDENT

BUREAU VERITAS NORTH AMERICA, INC.

CRAIG BAPTISTA, OPERATIONS DIR.

GENE BARRY, VICE PRESIDENT

ANDREA COLEY

CSG CONSULTANTS, INC.

CYRUS KIANPOUR, PRESIDENT

WEST COAST CODE CONSULTANTS, INC.

GIYAN SENERATNE, PRESIDENT

CHARLES D. RIER, SECRETARY

CHRIS ROSE, OPERATIONS MGR.

ATTEST:

BRET HUNTER, CMC
INTERIM CITY CLERK

APPROVED AS TO FORM:

JOHN LUEBBERKE
CITY ATTORNEY

COS and Professional Services Master Agreement Amendment
Resolution No. 2018-06-05-1103

STOCKTON CITY COUNCIL

RESOLUTION APPROVING AN AMENDMENT TO THE PROFESSIONAL SERVICES
MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, City Council approved a three-year Professional Services
Master Agreement with four (4) companies to provide on-call building plan review and
inspection, engineering plan review, and floodplain management services and

The approved compensation for services and reimbursable expenses was
$480,000 total across all consulting companies; and

The on-call building services support is used to mitigate the work created by the
influx of development activity when permanent City staff reaches near capacity and needs
additional resources to provide necessary service to the public; and

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year
(FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19; and

The funds projected for the contract were based on the building industry valuation
standards of approximately $340 million. Current projection for FY 2017-18 is estimated to
be approximately $500 million, which is a significant increase over FY 2016-17; and

Staff estimates a need for an additional $500,000 to be added to the last two years
of the term of the agreement. This increase, added to the remaining $160,000, will result
in $680,000 available funds for the remainder of the contract term; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS
FOLLOWS:

1. Council approves an amendment to the "Professional Services Master
   Agreement," between the City of Stockton and each of the following firms, already
   authorized and approved for the establishment of a Vendor Pool, to increase the overall
   contract amount by $520,000 bringing the total amount to $1,000,000.

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

2. The City Manager is hereby authorized and directed to execute the
   Amended Professional Services Master Agreement with each of the vendor pool firms on
   behalf of the City of Stockton.
3. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED June 5, 2018

[Signature]

MICHAEL D. TUBBS
Mayor of the City of Stockton

ATTEST:

[Signature]

BRET HUNTER, CMC
City Clerk of the City of Stockton
AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

RECOMMENDATION

It is recommended that the City Council adopt a resolution to:

1. Authorize the City Manager to execute an Amendment to Professional Services Master Agreement 2017-06-20-1103-NP to increase the overall contract amount by $520,000, bringing the total to $1,000,000 for the three-year contract term; and

2. Authorize the City Manager to take appropriate and necessary actions to carry out the purpose and intent of this resolution.

Summary

On June 20, 2017, the City Council approved a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP). Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. A combination of modest staffing increases and additional contracted services was included in the FY 2016-17 budget, and proposed again in the FY 2018-19 budget.

The increased development activity exceeded prior estimates and current resources are insufficient to manage the additional workload. More contracted services are recommended to maintain the current service levels for the remainder of the contract, which ends July 25, 2020. The contract limit would be increased by $520,000 for a revised three-year compensation limit of $1 million. The original contract was awarded following an open Request for Qualifications process and four firms were selected to provide on-call services. Staff recommends adoption of the proposed resolution to address the workload associated with increased development activity.

DISCUSSION

Background

As part of the fiscal year 2016-17 budget, a combination of modest staffing increases and consulting services was determined to be the most responsible way to address increased development activity and increased demand for the Community Development Department. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring
permanent specialist staff. The combination of modest staffing increases and contracted services is also recommended in the FY 2018-19 budget to address the workload associated with continued development activity increases.

City Council approved a three-year Professional Services Master Agreement on June 20, 2017, with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services.

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- West Coast Code Consultants, Inc., San Ramon, CA

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies. The agreement structure is an integral part of providing high-level services to the public. The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public.

Present Situation

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19. This original amount averaged to $13,333 per month. Currently, using the highest rate charged for services by any of the vendors in the past four months, the estimated average is approximately $27,000 per month.

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17 (Table 1.). This increase in construction activity required a corresponding increase in the number of building inspection stops. To address the increase in permit activity and inspections needed, especially during this peak period, staff utilized contract services for plan reviews and inspections at a higher than expected rate to supplement city staff. The staff is projecting a need for an additional $520,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term to address this higher peak level of permit activity and meet customer needs.

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<td>$411 million (as of April 30) $500+ million (estimate for end of FY)</td>
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FINANCIAL SUMMARY

This is a 3 year contract and the annual costs are displayed in the table below. There is sufficient budget allocated in FY 2017-18 and planned for FY 2018-19 in the proposed budget to cover the first 2 years of the contract. Final year (FY 2019-20) appropriation will be budgeted through the annual budget process.

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<td></td>
<td></td>
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</table>

Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP
Attachment B - Amendment Master On-Call Building Professional Services Agreement
MEMORANDUM

June 11, 2018

TO: Kurt O. Wilson, City Manager

FROM: David W. Kwong, Director

SUBJECT: CONTRACT CHANGE ORDER #1 - PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 5, 2018, the above item was approved by City Council by resolution number 2018-06-05-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document.

DAVID W. KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DATE

DK:mf

Attachments: Amendment To Professional Services Master Agreement
Professional Services Master Agreement

APPROVED BY:

KURT O. WILSON, CITY MANAGER
CITY OF STOCKTON

DATE
Hi Esther,

Find below the information requested in response to your voice message. Let me know if you have any questions or concerns.

CSG – 19-00114727 (expires 4/30/19)
BV – 19-00127671 (expires 6/30/19)
WC3 – 19-00127495 (expires 4/30/19)
4Leaf – 19-00078218 (expires 3/31/19)

Thank you,
Makinde Falade
Program Manager III

CITY OF STOCKTON
Community Development Department
(209) 937-7567

"Intellectuals solve problems; geniuses prevent them"
Albert Einstein
**ATTACHMENT B**

**CONTRACT ROUTING FORM**

- **Contract Number**: 2017-06-20-1103-NP-01. Amendment
- **Contract Amount**: $1,000,000

**Contract Title**: Professional Services Master Agreement for On-Call Building Service

- **Vendor/Other Party**: 4Leaf CSG, Bureau Veritas, WestCoast Code Consultants
- **Contract Start Date**: July 19, 2017
- **Contract End Date**: June 30, 2020
- **Contract Term**: 3 years

**Council Approval Required?** Yes

- **Council approval required for contracts over $75,000** for Fiscal Year 2018/19
- **Motion/Resolution/Ordinance No.**: 2018-05-05-1103

**Required Documents** (The following documents shall be submitted with the signed contract when required):

- **Business License Required?** Yes
- **Business License No.**: CSG 19-0014727
- **Bonds Required?** Yes
- **Bond No.**: 4Leaf #19-0007861
- **Insurance Required?** Yes
- **Insurance No.**: 4BS-71-19-0124195
- **Notary Required?** Yes
- **Recordation Required?** Yes

**Mandatory Routing Order**

1. **DEPARTMENT**: City Manager
   - **Department Head Approval**: July 19, 2017
   - **Project Mgr.**: Makinde Falade
   - **Staff**: 6/11/18
   - **Forwarded to**: Procurement

2. **PROCUREMENT**
   - **Approved By**: M. Staff
   - **Date**: 6/15/18
   - **Forwarded to**: 

3. **VENDOR/OTHER PARTY**
   - **Signed (Y) originals on**: 
   - **Forwarded to**: 

4. **RISK SERVICES**
   - **Insurance on**: 6/18/18
   - **Bonds Approved on**: 6/18/18
   - **Forwarded to**: 

5. **CITY ATTORNEY**
   - **Approved as to Form and Content on**: 6/20/18
   - **Forwarded to**: 

6. **CITY MANAGER**
   - **Signed by City Manager on**: 6/28/18
   - **Forwarded to**: Clerk

7. **CITY CLERK**
   - **City Clerk attested on**: 6/28/18
   - **Returned (P) original(s) to dept. on**: 
   - **Retained (A) original(s) for City's file. Hard Copy on file? Yes ☐ No ☐ OB #**

8. **ORIGIRATING DEPARTMENT**
   - **Requisition No.**
   - **Original sent to vendor on**: 
   - **Copy of contract to be retained by department. Original on file in the Clerk's office.**
   - **Copy of contract sent to Purchasing on**: 

9. **PROCUREMENT**: Purchase Order No. PUR No.
AMENDMENT TO PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AMENDMENT TO Professional Services Master Agreement is made and entered into this 27 day of June 2018, between the CITY OF STOCKTON, a municipal corporation (“City”), and 4LEAF, Inc., a California “C” Corporation whose address is 8896 N Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, (“Consultant”), and Bureau Vertias North America, Inc., a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-420, (“Consultant”), and CSG Consultants, Inc., a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, (“Consultant”), and West Coast Code Consultants, Inc., a California “S” Corporation whose address is 2400 Camino Ramon, Suite 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, (“Consultant”).

RECITALS

WHEREAS, the Parties entered into a Professional Services Master Agreement for on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management on July 25, 2017 (“Original Agreement”), pursuant to Resolution 2017-06-20-1103, as part of a vendor pool and desire to amend said Agreement, and

WHEREAS, the Original Agreement approved compensation for services and reimbursable expenses in an amount not to exceed Four Hundred, Eighty Thousand Dollars ($480,000.00) total across all Consultants; and

WHEREAS, the services provided for under this Agreement are vital to functions carried out by the Community Development Department; and

WHEREAS, due to an unforeseen increase in economic growth, the City and Consultant previously approved compensation will not support the increased building services work demand; and

WHEREAS, the City and Consultant now wish to update the Original Agreement, due to this unanticipated construction intensification, by entering into an Amended Professional Services Master Agreement and raise the compensation to One Million Dollars ($1,000,000.00) total across all Consultants.

NOW, THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:
1. Section 4: Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Dollars ($1,000,000.00), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America, Inc.), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

2. All other terms and conditions of the said original Professional Services Master Agreement shall remain unchanged and in full force and effect unless modified in writing by both parties.
IN WITNESS WHEREOF, the parties have caused this Amendment to the Professional Services Master Agreement to be executed on the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

KEVIN J. DUGGAN, PRESIDENT

GENE BARRY, VICE PRESIDENT

CYSRUS KIANPOUR, PRESIDENT

CHARLES D. RIER, SECRETARY

CSG CONSULTANTS, INC.

BUREAU VERITAS NORTH AMERICA, INC.

CRAIG BAPTISTA, OPERATIONS DIR.

ANDREA COLEY

WEST COAST CODE CONSULTANTS, INC.

GIYAN SENERATNE, PRESIDENT

CHRIS ROSE, OPERATIONS MGR.

ATTEST:

APPROVED AS TO FORM:

BRET HUNTER, CMC
INTERIM CITY CLERK

JOHN LUEBBERKE
CITY ATTORNEY

COS and Professional Services Master Agreement Amendment
Resolution No. 2018-06-05-1103

STOCKTON CITY COUNCIL

RESOLUTION APPROVING AN AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, City Council approved a three-year Professional Services Master Agreement with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services and

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies; and

The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public; and

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19; and

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17; and

Staff estimates a need for an additional $500,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. Council approves an amendment to the “Professional Services Master Agreement,” between the City of Stockton and each of the following firms, already authorized and approved for the establishment of a Vendor Pool, to increase the overall contract amount by $520,000 bringing the total amount to $1,000,000.

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

2. The City Manager is hereby authorized and directed to execute the Amended Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.
3. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED  June 5, 2018  

Michael Tubbs  
Mayor of the City of Stockton

ATTEST:  
Bret Hunter, CMC  
City Clerk of the City of Stockton
City of Stockton

Legislation Text

File #: 18-4499, Version: 1

AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

RECOMMENDATION

It is recommended that the City Council adopt a resolution to:

1. Authorize the City Manager to execute an Amendment to Professional Services Master Agreement 2017-06-20-1103-NP to increase the overall contract amount by $520,000, bringing the total to $1,000,000 for the three-year contract term; and

2. Authorize the City Manager to take appropriate and necessary actions to carry out the purpose and intent of this resolution.

Summary

On June 20, 2017, the City Council approved a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP). Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. A combination of modest staffing increases and additional contracted services was included in the FY 2016-17 budget, and proposed again in the FY 2018-19 budget.

The increased development activity exceeded prior estimates and current resources are insufficient to manage the additional workload. More contracted services are recommended to maintain the current service levels for the remainder of the contract, which ends July 25, 2020. The contract limit would be increased by $520,000 for a revised three-year compensation limit of $1 million. The original contract was awarded following an open Request for Qualifications process and four firms were selected to provide on-call services. Staff recommends adoption of the proposed resolution to address the workload associated with increased development activity.

DISCUSSION

Background

As part of the fiscal year 2016-17 budget, a combination of modest staffing increases and consulting services was determined to be the most responsible way to address increased development activity and increased demand for the Community Development Department. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring.
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The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies. The agreement structure is an integral part of providing high-level services to the public. The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public.

Present Situation

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The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17 (Table 1.). This increase in construction activity required a corresponding increase in the number of building inspection stops. To address the increase in permit activity and inspections needed, especially during this peak period, staff utilized contract services for plan reviews and inspections at a higher than expected rate to supplement city staff. The staff is projecting a need for an additional $520,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term to address this higher peak level of permit activity and meet customer needs.

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This is a 3 year contract and the annual costs are displayed in the table below. There is sufficient budget allocated in FY 2017-18 and planned for FY 2018-19 in the proposed budget to cover the first 2 years of the contract. Final year (FY 2019-20) appropriation will be budgeted through the annual budget process.

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Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP
Attachment B - Amendment Master On-Call Building Professional Services Agreement
MEMORANDUM

June 11, 2018

TO: Kurt O. Wilson, City Manager

FROM: David W. Kwong, Director

SUBJECT: CONTRACT CHANGE ORDER #1 - PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 5, 2018, the above item was approved by City Council by resolution number 2018-06-05-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document.

[Signature]
DAVID W. KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

DATE 6/11/18

DK:mf
Attachments: Amendment To Professional Services Master Agreement
Professional Services Master Agreement

APPROVED BY:

[Signature]
KURT O. WILSON, CITY MANAGER
CITY OF STOCKTON

DATE
Hi Esther,

Find below the information requested in response to your voice message. Let me know if you have any questions or concerns.

CSG - 19-00114727 (expires 4/30/19)
BV - 19-00127671 (expires 6/30/19)
WC3 - 19-00127495 (expires 4/30/19)
4Leaf - 19-00078218 (expires 3/31/19)

Thank you,
Makinde Falade
Program Manager III

CITY OF STOCKTON
Community Development Department
(209) 957-7567

"Intellectuals solve problems; geniuses prevent them."
Albert Einstein
### ATTACHMENT B

**CONTRACT ROUTING FORM**

**City of Stockton**
City Manager's Office

**Contract Number:** 2017-06-20-1103-NP-CA amendment

**CITY CONTRACT TYPE (select one):**
- Original
- Amendment/Change Order
- Grant
- Subdivision Agreement
- Other

**CONTRACT INFORMATION**

- **Contract Amount:** $1,000,000
- **Contract Title:** PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICE
- **Vendor/Other Party:** Leaf CSG - Bureau Veritas - West Coast Code Consultants
- **Contract Start Date:** July 19, 2017
- **Contract End Date:** June 30, 2020
- **Contract Term:** 3 years

**COUNCIL APPROVAL REQUIRED?**
- Yes
- No (provide account # if no)
- **Council approval required for contracts over $75,000** for FISCAL YEAR: 2018/19
- **Motion/Resolution/Ordinance No.:** 2018-06-05-1103
- **Must be Attached:** Yes

**REQUIRED DOCUMENTS**
- **Business License Required?** Yes
- **Business License No.:** CSG 19-00114727
- **Bonds Required?** Yes
- **Bonds approved:** Yes
- **Insurance Required?** Yes
- **Insurance:** Yes
- **Notary Required?** Yes
- **Recordation Required?** No

**Mandatory Routing Order**

<table>
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<th>DEPARTMENT</th>
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<td>CDO</td>
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**DEPARTMENT HEAD APPROVAL**

- **Project Mgr.:** Melinda Felada
- **Ext.:** 7667
- **Staff.:** [Staff Name] by: [Signature]

**PROCUREMENT**

- **Approved:** Yes
- **Name/Signature:** [Name/Signature]
- **Forwarded to:** Procurement

**VENDOR/OTHER PARTY**

- **Signed:** [Signature]

**RISK SERVICES**

- **Insurance:** 6/18/18 by: [Signature]
- **Bonds approved:** 6/18/18 by: [Signature]

**CITY ATTORNEY**

- **Approved as to Form and Content on:** 6/20/18 by: [Signature]

**CITY MANAGER**

- **Signed by City Manager on:** 6/20/18

**CITY CLERK**

- **City Clerk attested on:** 6/28/18
- **Returned (1) original(s) to dept. on:** 6/28/18
- **Retained (all) original(s) for City's file.**
- **Hard Copy on file?** Yes
- **OB #**

**ORIGINATING DEPARTMENT**

- Original sent to vendor on:
- **Copy of contract to be retained by department. Original on file in the Clerk's office.**
- Copy of contract sent to Purchasing on:

**PROCUREMENT: Purchase Order No.**

### ATTACHMENT B
AMENDMENT TO PROFESSIONAL SERVICES MASTER AGREEMENT

THIS AMENDMENT TO Professional Services Master Agreement is made and entered into this 27th day of June 2018, between the CITY OF STOCKTON, a municipal corporation ("City"), and 4LEAF, Inc., a California "C" Corporation whose address is 8896 N Winding Way, Fair Oaks, CA 95628 and telephone number is (925) 462-5959, ("Consultant"), and Bureau Vertias North America, Inc., a Delaware Corporation whose address is 180 Promenade Circle, Suite 150, Sacramento, CA 95834 and telephone number is (916) 725-420, ("Consultant"), and CSG Consultants, Inc., a California Corporation whose address is 1022 G Street, Sacramento, CA 95814 and telephone number is (916) 492-2275, ("Consultant"), and West Coast Code Consultants, Inc., a California "S" Corporation whose address is 2400 Camino Ramon, Suite 240, San Ramon, CA 94583 and telephone number is (925) 275-1700, ("Consultant").

RECITALS

WHEREAS, the Parties entered into a Professional Services Master Agreement for on-call building plan review and inspection services, engineering plan review including CASp compliance and OSHPD 3 certification, construction and floodplain management on July 25, 2017 ("Original Agreement"), pursuant to Resolution 2017-06-20-1103, as part of a vendor pool and desire to amend said Agreement, and

WHEREAS, the Original Agreement approved compensation for services and reimbursable expenses in an amount not to exceed Four Hundred, Eighty Thousand Dollars ($480,000.00) total across all Consultants; and

WHEREAS, the services provided for under this Agreement are vital to functions carried out by the Community Development Department; and

WHEREAS, due to an unforeseen increase in economic growth, the City and Consultant previously approved compensation will not support the increased building services work demand; and

WHEREAS, the City and Consultant now wish to update the Original Agreement, due to this unanticipated construction intensification, by entering into an Amended Professional Services Master Agreement and raise the compensation to One Million Dollars ($1,000,000.00) total across all Consultants.

NOW, THEREFORE, in consideration of the mutual covenants and conditions in this Agreement, City and Consultant agree as follows:
1. Section 4: Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Dollars ($1,000,000.00), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America, Inc.), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

2. All other terms and conditions of the said original Professional Services Master Agreement shall remain unchanged and in full force and effect unless modified in writing by both parties.
IN WITNESS WHEREOF, the parties have caused this Amendment to the Professional Services Master Agreement to be executed on the date and year first above written.

CITY OF STOCKTON

KURT O. WILSON
CITY MANAGER

4LEAF, INC.

KEVIN J. DUGGAN, PRESIDENT

GENE BARRY, VICE PRESIDENT

CSG CONSULTANTS, INC.

CYRUS KIANPOUR, PRESIDENT

CHARLES D. RIER, SECRETARY

BUREAU VERITAS NORTH AMERICA, INC.

CRAIG BAPTISTA, OPERATIONS DIR.

ANDREA COLEY

WEST COAST CODE CONSULTANTS, INC.

GIYAN SENERATNE, PRESIDENT

CHRISS ROSE, OPERATIONS MGR.

ATTEST:

BRET HUNTER, INTERIM CITY CLERK

APPROVED AS TO FORM:

JOHN LUEBBERKE
CITY ATTORNEY
Resolution No. 2018-06-05-1103

STOCKTON CITY COUNCIL

RESOLUTION APPROVING AN AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, City Council approved a three-year Professional Services Master Agreement with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services and

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies; and

The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public; and

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19; and

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17; and

Staff estimates a need for an additional $500,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF STOCKTON, AS FOLLOWS:

1. Council approves an amendment to the "Professional Services Master Agreement," between the City of Stockton and each of the following firms, already authorized and approved for the establishment of a Vendor Pool, to increase the overall contract amount by $520,000 bringing the total amount to $1,000,000.

   a. 4LEAF, Inc. Fair Oaks, CA
   b. CSG Consultants, Inc., Sacramento, CA
   c. Bureau Veritas North America, Inc., Sacramento, CA
   d. West Coast Code Consultants, Inc., San Ramon, CA

2. The City Manager is hereby authorized and directed to execute the Amended Professional Services Master Agreement with each of the vendor pool firms on behalf of the City of Stockton.
3. The City Manager is hereby authorized to take whatever actions are necessary and appropriate to carry out the purpose and intent of this Resolution.

PASSED, APPROVED, and ADOPTED June 5, 2018.

MICHAEL D. TUBBS
Mayor of the City of Stockton

ATTEST:
BRET HUNTER, CMC
City Clerk of the City of Stockton
AMENDMENT TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

RECOMMENDATION

It is recommended that the City Council adopt a resolution to:

1. Authorize the City Manager to execute an Amendment to Professional Services Master Agreement 2017-06-20-1103-NP to increase the overall contract amount by $520,000, bringing the total to $1,000,000 for the three-year contract term; and

2. Authorize the City Manager to take appropriate and necessary actions to carry out the purpose and intent of this resolution.

Summary

On June 20, 2017, the City Council approved a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP). Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. Because of this cycle, adding permanent staff to meet the increased demand is not always prudent and can lead to overstaffing when the economy is in decline. A combination of modest staffing increases and additional contracted services was included in the FY 2016-17 budget, and proposed again in the FY 2018-19 budget.

The increased development activity exceeded prior estimates and current resources are insufficient to manage the additional workload. More contracted services are recommended to maintain the current service levels for the remainder of the contract, which ends July 25, 2020. The contract limit would be increased by $520,000 for a revised three-year compensation limit of $1 million. The original contract was awarded following an open Request for Qualifications process and four firms were selected to provide on-call services. Staff recommends adoption of the proposed resolution to address the workload associated with increased development activity.

DISCUSSION

Background

As part of the fiscal year 2016-17 budget, a combination of modest staffing increases and consulting services was determined to be the most responsible way to address increased development activity and increased demand for the Community Development Department. This approach avoids over-hiring of permanent staff in response to cyclical development activity by using consultants to augment staffing and procure specialized planning services that would not be economical to provide by hiring
permanent specialist staff. The combination of modest staffing increases and contracted services is also recommended in the FY 2018-19 budget to address the workload associated with continued development activity increases.

City Council approved a three-year Professional Services Master Agreement on June 20, 2017, with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services.

- 4Leaf, Inc., Fair Oaks, CA
- Bureau Veritas North America, Inc., Sacramento, CA
- CSG Consultants, Inc., Sacramento, CA
- West Coast Code Consultants, Inc., San Ramon, CA

The approved compensation for services and reimbursable expenses was $480,000 total across all consulting companies. The agreement structure is an integral part of providing high-level services to the public. The on-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public.

Present Situation

Of the original $480,000 contract amount, $320,000 was allocated for Fiscal Year (FY) 2017-18, with the remaining $160,000 to be made available during FY 2018-19. This original amount averaged to $13,333 per month. Currently, using the highest rate charged for services by any of the vendors in the past four months, the estimated average is approximately $27,000 per month.

The funds projected for the contract were based on the building industry valuation standards of approximately $340 million. Current projection for FY 2017-18 is estimated to be approximately $500 million, which is a significant increase over FY 2016-17 (Table 1.). This increase in construction activity required a corresponding increase in the number of building inspection stops. To address the increase in permit activity and inspections needed, especially during this peak period, staff utilized contract services for plan reviews and inspections at a higher than expected rate to supplement city staff. The staff is projecting a need for an additional $520,000 to be added to the last two years of the term of the agreement. This increase, added to the remaining $160,000, will result in $680,000 available funds for the remainder of the contract term to address this higher peak level of permit activity and meet customer needs.

Table 1.

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Valuation</th>
<th>Annual Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 - 14</td>
<td>$153 million</td>
<td></td>
</tr>
<tr>
<td>2014 - 15</td>
<td>$212 million</td>
<td>39.0%</td>
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<tr>
<td>2015 - 16</td>
<td>$306 million</td>
<td>44.5%</td>
</tr>
<tr>
<td>2016 - 17</td>
<td>$334 million</td>
<td>9.2%</td>
</tr>
<tr>
<td>2017 - 18</td>
<td>$411 million (as of April 30) $500+ million (estimate for end of FY)</td>
<td>23.0%</td>
</tr>
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</table>
FINANCIAL SUMMARY

This is a 3 year contract and the annual costs are displayed in the table below. There is sufficient budget allocated in FY 2017-18 and planned for FY 2018-19 in the proposed budget to cover the first 2 years of the contract. Final year (FY 2019-20) appropriation will be budgeted through the annual budget process.

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<th>Fiscal Year</th>
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<td>FY 2017-18</td>
<td>Building Division (048-1830-510)</td>
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<tr>
<td>FY 2018-19</td>
<td>Building Division (048-1830-510)</td>
<td>$400,000</td>
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<tr>
<td>FY 2019-20</td>
<td>Building Division (048-1830-510)</td>
<td>$280,000</td>
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</table>

$1,000,000

Attachment A - Professional Master Services Agreement 2017-06-20-1103-NP
Attachment B - Amendment Master On-Call Building Professional Services Agreement
MEMORANDUM

June 11, 2018

TO: Kurt O. Wilson, City Manager

FROM: David W. Kwong, Director

SUBJECT: CONTRACT CHANGE ORDER #1 - PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 5, 2018, the above item was approved by City Council by resolution number 2018-06-05-1103. The contents of this item remain the same, of which, no changes have been made since its adoption by City Council. With the action taken by the City Council, the City Manager is authorized to execute the attached document.

[Signature]
DAVID W. KWONG, DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

6/11/18
DATE

DK:mf

Attachments: Amendment To Professional Services Master Agreement
Professional Services Master Agreement

APPROVED BY:

[Signature]
KURT O. WILSON, CITY MANAGER
CITY OF STOCKTON

DATE
Hi Esther,

Find below the information requested in response to your voice message. Let me know if you have any questions or concerns.

CSG – 19-00114727 (expires 4/30/19)
BV – 19-00127671 (expires 6/30/19)
WC3 – 19-00127495 (expires 4/30/19)
4Leaf – 19-00078218 (expires 3/31/19)

Thank you,
Makinde Falade
Program Manager III

CITY OF STOCKTON
Community Development Department
(209) 937-7567

"Intellectuals solve problems; geniuses prevent them"
Albert Einstein
**CONTRACT ROUTING FORM**

**Contract Number**: 2017-06-20-1103-NP - DB Amendment

**City Manager's Office**

---

**CITY CONTRACT TYPE (select one)**
- Original
- Amendment/Change Order
- Grant
- Subdivision Agreement

**CONTRACT INFORMATION**
- Contract Amount: $1,000,000
- Contract Title: PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICE
- Vendor/Other Party: Leaf, CSG, Bureau Veritas, WestCoast Code Consultants
- Contract Start Date: July 19, 2017
- Contract End Date: June 30, 2020
- Contract Term: 3 years

---

**COUNCIL APPROVAL REQUIRED?**
- Yes
- No (provide account # if no)

Council approval required for contracts over $75,000.00 for FISCAL YEAR: 2018/19

**Motion/Resolution/Ordinance No.**: 2018-06-05-1103 Must be Attached

**REQUIRED DOCUMENTS** (The following documents shall be submitted with the signed contract when required):
- Business License Required: Yes
- Business License No.: 19-00114927
- Bonds Required: Yes
- By: Leaf 19-0127671
- Insurance Required: Yes
- WCB: 19-0124495

---

**Mandatory Routing Order**

1. **DEPARTMENT:** CDD
   - **DEPARTMENT HEAD APPROVAL**
     - Project Mgr: Makinde Falade
     - Ext: 7564
     - Staff:
     - Forwarded to: Procurement
     - Ext: 6/12/18
     - Staff:

2. **PROCUREMENT**
   - Forwarded to: Risk
   - Date: 6/12/18
   - By:

3. **VENDOR/OTHER PARTY**
   - Signed: Yes
   - Forwarded to:

4. **RISK SERVICES**
   - Insurance on: 6/18/18
   - Bonds approved on: 6/18/18
   - Forwarded to: CA
   - Ext: 6/18/18
   - By: CA
   - RM #: 18-450

5. **CITY ATTORNEY**
   - Approved as to Form and Content on: 6/20/18
   - Forwarded to: CM
   - Ext: 6/20/18
   - By: PMG

6. **CITY MANAGER**
   - Signed by City Manager on: 6/21/18
   - Forwarded to: Clerk
   - Ext: 6/24/18
   - By: CP

7. **CITY CLERK**
   - City Clerk attested on: 6/21/18
   - Returned ( ) original(s) to dept. on: 6/21/18
   - Retained ( ) original(s) for City's file. Hard Copy on file? Yes ☐ No ☐

8. **ORIGINATING DEPARTMENT**
   - Requisition No.
   - Original sent to vendor on: 6/21/18
   - Copy of contract to be retained by department. Original on file in the Clerk's office.
   - Copy of contract sent to Purchasing:

9. **PROCUREMENT: Purchase Order No.**
   - PUR No.
CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and 4Leaf "Contractor".

RECATALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
   "June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars ($1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

4LEAF, Inc.

Authorized Signature: ____________________________

Printed Name and Title of Person Signing: Kevin Duggan, President

Address: 2126 Rheem Dr., Pleasanton, CA 94588

CITY OF STOCKTON

Authorized Signature: ____________________________

Printed Name and Title of Person Signing: Laurie Montes, Acting City Manager

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebbenke, City Attorney

BY: ____________________________

2017-06-20-1103-NP

Amendment 2

(Rev. 6.6.19)
**CONTRACT ROUTING FORM**

**Contract Number:** 2017-06-20-1103 NP AMENDMENT #2

**For Clerk's Use:**

**CITY CONTRACT TYPE (select one):**
- Original
- Amendment/Change Order
- Grant
- Subdivision Agreement
- Other

**CONTRACT INFORMATION:**
- Contract Amount: $1,700,000
- Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES
- Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
- Contract Start Date: 07/19/17
- Contract End Date: 06/30/21
- Contract Term: 48 Months

**COUNCIL APPROVAL REQUIRED?**
- Yes ☐ No ☐ (provide account # if no)
- Council approval required for contracts over $75,000.
- Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104
- Must be Attached ☐

**REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):**
- Business License Required? ☐ Yes ☐ No
- Business License No: 4Leaf-20 00075218, BV-20 00127671
- Bonds Required? ☐ Yes ☐ No
- Bonds: CSG-20-00114727, WC3-20-00127495
- Insurance Required? ☐ Yes ☐ No
- Notary Required? ☐ Yes ☐ No
- Recordation Required? ☐ Yes ☐ No

**Mandatory Routing Order**

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<th>DEPARTMENT: Community Development</th>
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<tr>
<td>DEPARTMENT HEAD APPROVAL:</td>
<td>Heather Monn pulse: 83.10 Staff: ext:</td>
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<tr>
<td>Project Mgr:</td>
<td>Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by:</td>
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| PROCUREMENT: Approved (✓) Name/Signature: Marina Lemos on: 12/11/19 by: |

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<td>Forwarded to: __________________ by: __________________</td>
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<th>CITY ATTORNEY</th>
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<td>Signed by City Manager on: 12/19/19 Forwarded to: CC on: 12/19/19 by:</td>
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<td>City Clerk attested on: 12/19/19 Returned DDP original(s) to dept. on: 12/19/19 by:</td>
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<tr>
<td>Retained (4) original(s) for City's file. Hard Copy on file? ☐ Yes ☐ No ☐ OB #</td>
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<th>ORIGINATING DEPARTMENT:</th>
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</thead>
<tbody>
<tr>
<td>Requisition No. Original sent to vendor on: __________________ by:</td>
</tr>
<tr>
<td>Copy of contract to be retained by department. Original on file in the Clerk's office.</td>
</tr>
<tr>
<td>Copy of contract sent to Purchasing on: __________________ by:</td>
</tr>
</tbody>
</table>

4 originals retained = each of 4 vendors
MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add $520,000 bringing the total contract amount to $1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional $700,000 for a total of $1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.

SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

SC:hm

Attachments:
A. PSA Amendment 1
   - Contract 2017-06-20-1103 NP Amendment 1
   - Contract 2017-06-20-1103-01 NP Amendment 1
   - Contract 2017-06-20-1103-02 NP Amendment 1
   - Contract 2017-06-20-1103-03 NP Amendment 1

B. PSA Original
   - Contract 2017-06-20-1103 NP
   - Contract 2017-06-20-1103-01 NP
   - Contract 2017-06-20-1103-02 NP
   - Contract 2017-06-20-1103-03 NP

4Leaf - Professional Services Master Agreement
Bureau Veritas North America Inc - Professional Services Agreement
CSG Consultants - Professional Services Agreement
West Coast Code Consultants WC3 - Professional Services Agreement
AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. Increase funding for individual projects by $700,000 for a revised amount not to exceed $1,700,000 across the entire vendor pool; and

3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed $1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.
DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled $480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by $520,000; bringing the total to $1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the $1 million contract total ($480,000 original contract and $520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, $320,000 was expended the first year and $400,000 was expended the second year. This leaves $280,000 remaining for FY 2019-20. At the current expenditure rate which averages $40,000 per month, the forecasted rate of expenditure will require an additional $700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

- FY 2014/15 - $212 million
- FY 2015/16 - $303 million
- FY 2016-17 - $308 million
- FY 2017-18 - $408 million
- FY 2018-19 - $441 million

Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, $419 million and $427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional $700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add $220,000 to the $280,000 remaining in FY 2019-20, and provide a total amount of $500,000 for FY 2019-20 and $480,000 for FY 2020-21.
As stated, $280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the $500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

Attachment A - Master Services Agreement 2017-06-20-1103 NP
Attachment B - Master Services Agreement Amendment 1
Attachment C - Permit Activity Chart
Attachment D - Proposed Master Services Agreement Amendment 2
### Change Order Calculator

**Vendor:** 4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc  
**Dept:** CDD  
**Project #:** Master On-Call Bldg Services PUR 17-001  
**Date:** 12/05/19  
**PO Number:** 201263 - 201266  
**Account Number:** 048-18-530.20-65  

**Entries in bold red indicate your balance of CM authority CCO amount is exceeded. You must go to council for approval.**  
(Effective 2/26/15: CM Authority = $75,000)

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<th>CCO No.</th>
<th>Description</th>
<th>Requested CCO Amount</th>
<th>Time Extensions</th>
<th>Required Approval by</th>
<th>Date CC Approved (mm/dd/yy)</th>
<th>Revised Contract Amount</th>
<th>Revised CCO Authority Balance</th>
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<td>Y</td>
<td>10/29/19</td>
<td>$1,700,000.00</td>
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**Total CCO Amount and Time Extension To-Date ——>** $1,220,000.00 
12
## PREVIOUSLY APPROVED CCO LIST

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<th>CCO No.</th>
<th>Description</th>
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<th>Approval by:</th>
<th>Date Approved (mm/dd/yy)</th>
<th>Revised Contract Amount</th>
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<td>$520,000.00</td>
<td></td>
<td>Y</td>
<td>06/27/18</td>
<td>$1,000,000.00</td>
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</table>

**Total CCO Amount and Time Extension To-Date** $520,000.00 06/27/18 $1,000,000.00
CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and Bureau Veritas North America, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
   "June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars ($1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

Bureau Veritas North America

Authorized Signature

November 15, 2019

Craig Baptista, Director of Operations

Printed Name and Title of Person Signing

180 Promenade Circle, ste. 150 Sacramento, CA 95834

Address

CITY OF STOCKTON

Laurie Montes, Acting City Manager

Date

Eliza R. Garza CMC, City Clerk

ATTEST:

APPROVED AS TO FORM:

John M. Luebbenke, City Attorney

BY:

(Rev. 6.6.19)
CONTRACT ROUTING FORM

Contract Number 2017-06-20-1103 NP AMENDMENT #2
(For Clerk’s Use)

CITY CONTRACT TYPE (select one)
○ Original ○ Amendment/Change Order ○ Grant ○ Subdivision Agreement ○ Other

CONTRACT INFORMATION
Contract Amount: $1,700,000

Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES
Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
Contract Start Date: 07/19/17 Contract End Date: 06/30/21 Contract Term: 48 Months

COUNCIL APPROVAL REQUIRED? ○ Yes ○ No (provide account # if no)
Council approval required for contracts over $75,000 for FISCAL YEAR: 2019/20
Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104 Must be Attached ○

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):
Business License Required? ○ Yes ○ No Business License No: 4Leaf-20 00078218, BV-20 00127671
Bond Required? ○ Yes ○ No Bonding Company:
Insurance Required? ○ Yes ○ No
Notary Required? ○ Yes ○ No Recodertion Required? ○ Yes ○ No

Mandatory Routing Order

1 DEPARTMENT: Community Development
DEPARTMENT HEAD APPROVAL ( ) MN
Project Mgr: Heather Morpean ext: 5300 Staff: ext:
Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by:

2 PROCUREMENT
Approved ( ) Name/Signature: Marina Lemos Date: 12/11/19
Forwarded to: by:

3 VENDOR OTHER PARTY
Signed ( ) originals on:
Forwarded to:

4 RISK SERVICES
Insurance on: 12/18/19 by:
Bonds approved on: 12/18/19 by:
Forwarded to: CA on: 12/18/19 by: RM #: 20-188

5 CITY ATTORNEY
Approved as to Form and Content on: 12/18/19 by:
Forwarded to: CM on: 12/18/19 by:

6 CITY MANAGER
Signed by City Manager on: 12/24/19 Forwarded to: CC on: 12/24/19 by:

7 CITY CLERK
City Clerk attested on: 12/24/19 Returned ( ) original(s) to dept. on: 12/24/19 by:
Retained ( ) original(s) for City’s file. Hard Copy on file? Yes ○ No ○ OB #

8 ORIGINATING DEPARTMENT:
Requisition No. Original sent to vendor on:
Copy of contract to be retained by department. Original on file in the Clerk’s office.
Copy of contract sent to Purchasing on:

9 PROCUREMENT Purchase Order No. PUR No.

*4 originals retained = each of 4 vendors
MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add $520,000 bringing the total contract amount to $1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional $700,000 for a total of $1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.

SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19

DATE

Attachments:
A. PSA Amendment 1
   Contract 2017-06-20-1103 NP Amendment 1
   Contract 2017-06-20-1103-01 NP Amendment 1
   Contract 2017-06-20-1103-02 NP Amendment 1
   Contract 2017-06-20-1103-03 NP Amendment 1

B. PSA Original
   Contract 2017-06-20-1103 NP
   Contract 2017-06-20-1103-01 NP
   Contract 2017-06-20-1103-02 NP
   Contract 2017-06-20-1103-03 NP

4Leaf - Professional Services Master Agreement
Bureau Veritas North America Inc - Professional Services Agreement
CSG Consultants - Professional Services Agreement
West Coast Code Consultants WC3 - Professional Services Agreement
AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. Increase funding for individual projects by $700,000 for a revised amount not to exceed $1,700,000 across the entire vendor pool; and

3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed $1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.
DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled $480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by $520,000; bringing the total to $1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the $1 million contract total ($480,000 original contract and $520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, $320,000 was expended the first year and $400,000 was expended the second year. This leaves $280,000 remaining for FY 2019-20. At the current expenditure rate which averages $40,000 per month, the forecasted rate of expenditure will require an additional $700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

- FY 2014/15 - $212 million
- FY 2015/16 - $303 million
- FY 2016-17 - $308 million
- FY 2017-18 - $408 million
- FY 2018-19 - $441 million

Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, $419 million and $427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional $700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add $220,000 to the $280,000 remaining in FY 2019-20, and provide a total amount of $500,000 for FY 2019-20 and $480,000 for FY 2020-21.
As stated, $280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the $500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

Attachment A - Master Services Agreement 2017-06-20-1103 NP
Attachment B - Master Services Agreement Amendment 1
Attachment C - Permit Activity Chart
Attachment D - Proposed Master Services Agreement Amendment 2
# Change Order Calculator

**Vendor:** A Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc  
**Dept:** CDD  
**Project #** Master On-Call Bldg Services PUR 17-001  
**Date:** 12/05/19  
**PO Number:** 201263 - 201266  
**Account Number:** 048-18-530.20-65

**Original Contract Amount:** $480,000.00  
**Original Contract Award Date:** 07/19/17  
**Original Contract Expiration Date:** 06/30/20

**Contract Amount to date:** $1,700,000.00  
**Authorized CCO Amount to date:** $1,220,000.00  
**Available CCO Funding:**  
**Contract Expiration to date:** 06/30/21

---

**Entries in bold red indicate**  
**Your balance of CM Authority CCO amount is exceeded.**  
**You must go to Council for approval.**  
*(Effective 2/26/15: CM Authority = $75,000)*

---

<table>
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<th>CCO No.</th>
<th>Description</th>
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## Previously Approved CCOs

## New Proposed CCOs

2 Increase Funding  
$700,000.00  
Y  
10/29/19  
$1,700,000.00  
$235,000.00

2 Contract extended 6/30/21  
12  
10/29/19

---

**Total CCO Amount and Time Extension To-Date:** $1,220,000.00  
12
## PREVIOUSLY APPROVED CCO LIST

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<th>CCO No.</th>
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<tr>
<td>1</td>
<td>Amend 1 to add funds</td>
<td>$520,000.00</td>
<td></td>
<td>y</td>
<td>06/27/18</td>
<td>$1,000,000.00</td>
</tr>
</tbody>
</table>

**Total CCO Amount and Time Extension To-Date**: $520,000.00 06/27/18 $1,000,000.00
CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and CSG Consultants, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
   "June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars ($1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

CSG Consultants, Inc., a California corporation

Contractor’s Name (If other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Cyrus Kianpour, President

Printed Name and Title of Person Signing

550 Pilgrim Drive, Foster City, CA 94404

Address

CITY OF STOCKTON

Laurie Montes, Acting City Manager

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebbenke, City Attorney

BY:

(Rev. 6.6.19)
**CONTRACT ROUTING FORM**

Contract Number: 2017-06-20-1103 NP AMENDMENT #2

---

**CITY CONTRACT TYPE (select one)**
- Original
- Amendment/Change Order
- Grant
- Subdivision Agreement
- Other

---

**CONTRACT INFORMATION**

- Contract Amount: $1,700,000
- Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES
- Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
- Contract Start Date: 07/19/17
- Contract End Date: 09/30/21
- Contract Term: 48 Months

---

**COUNCIL APPROVAL REQUIRED?**
- Yes
- No (provide account # if no)
- Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-25-1104
- Must be Attached

---

**REQUIRED DOCUMENTS**

- Business License Required?
  - Yes
  - No
  - Business License No: 4Leaf-20 00078218, BV-20 00127671
- Bonds Required?
  - Yes
  - No
  - CSG-20-00114727, WC3-20-00127495
- Insurance Required?
  - Yes
  - No
- Notary Required?
  - Yes
  - No
  - Recodard Required?
  - Yes
  - No

---

**Mandatory Routing Order**

1. **DEPARTMENT:** Community Development
   - DEPARTMENT HEAD APPROVAL: [signature] date: 12/11/19
   - Project Mgr: Heather Monpean
     - ext: 3340
   - Staff: [signature]
     - ext: [signature]
   - Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by: [signature]

2. **PROCUREMENT**
   - Approved (✓) Name/Signature: Marina Lemos
   - Forwarded to: [signature] on: 12/13/19 by: [signature]

3. **VENDOR/OTHER PARTY**
   - Signed (✓) originals on: [signature]
   - Forwarded to: [signature]

4. **RISK SERVICES**
   - Insurance on: 12/18/19
   - Bonds approved on: 12/18/19
   - Forwarded to: [signature]
     - on: 12/18/19
   - RM #: 20-198
   - [signature]

5. **CITY ATTORNEY**
   - Approved as to Form and Content on: [signature]
   - Forwarded to: [signature]
     - on: 12/18/19

6. **CITY MANAGER**
   - Signed by City Manager on: 12/24/19
   - Forwarded to: [signature]
     - on: 12/24/19

7. **CITY CLERK**
   - City Clerk attested on: 12/24/19
   - Returned original(s) to dept. on: 12/24/19
   - Retained (4) original(s) for City's file. Hard Copy on file? [No]

8. **ORIGINATING DEPARTMENT:**
   - Requisition No.
   - Original sent to vendor on: [signature]
   - Copy of contract to be retained by department. Original on file in the Clerk's office.
   - Copy of contract sent to Purchasing on: [signature]

9. **PROCUREMENT:** Purchase Order No.
   - PUR No.

---

*4 originals retained - each of 4 vendors*
MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add $520,000 bringing the total contract amount to $1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

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All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.

SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

Attachments:
A. PSA Amendment 1
   Contract 2017-06-20-1103 NP Amendment 1
   Contract 2017-06-20-1103-01 NP Amendment 1
   Contract 2017-06-20-1103-02 NP Amendment 1
   Contract 2017-06-20-1103-03 NP Amendment 1

B. PSA Original
   Contract 2017-06-20-1103 NP
   Contract 2017-06-20-1103-01 NP
   Contract 2017-06-20-1103-02 NP
   Contract 2017-06-20-1103-03 NP
AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
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There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

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DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled $480,000 across all consulting companies.

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Of the $1 million contract total ($480,000 original contract and $520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, $320,000 was expended the first year and $400,000 was expended the second year. This leaves $280,000 remaining for FY 2019-20. At the current expenditure rate which averages $40,000 per month, the forecasted rate of expenditure will require an additional $700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

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Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, $419 million and $427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional $700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add $220,000 to the $280,000 remaining in FY 2019-20, and provide a total amount of $500,000 for FY 2019-20 and $480,000 for FY 2020-21.
As stated, $280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the $500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

Attachment A - Master Services Agreement 2017-06-20-1103 NP
Attachment B - Master Services Agreement Amendment 1
Attachment C - Permit Activity Chart
Attachment D - Proposed Master Services Agreement Amendment 2
# Change Order Calculator

**Vendor:** 4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc  
**Dept:** CDD  
**Project #:** Master On-Call Bldg Services PUR 17-001

**Date:** 12/05/19  
**PO Number:** 201263 - 201266  
**Account Number:** 048-18-530.20-65

**Original Contract Amount:** $480,000.00  
**Original Contract Award Date:** 07/19/17  
**Original Contract Expiration Date:** 06/30/20

**Contract Amount to date:** $1,700,000.00  
**Authorized CCO Amount to date:** $1,220,000.00

**Contract Expiration to date:** 06/30/21

**Entries in bold red indicate your balance of CM Authority CCO amount is exceeded. You must go to Council for approval.**  
(Effective 2/26/15: CM Authority = $75,000)

### Previously Approved CCOs

<table>
<thead>
<tr>
<th>CCO No.</th>
<th>Description</th>
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<th>Time Extensions</th>
<th>Required Approval by:</th>
<th>Revised Contract Amount</th>
<th>Revised CCO Authority Balance</th>
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<tr>
<td></td>
<td>Last Council Action</td>
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<td>Y</td>
<td>06/27/18</td>
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### New Proposed CCOs

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<tr>
<td>2</td>
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<td>2</td>
<td>Contract extended 6/30/21</td>
<td></td>
<td></td>
<td></td>
<td>10/29/19</td>
<td></td>
</tr>
</tbody>
</table>

**Total CCO Amount and Time Extension To-Date**  
$1,220,000.00  
12
<table>
<thead>
<tr>
<th>CCO No.</th>
<th>Description</th>
<th>Requested CCO Amount</th>
<th>Time Extensions</th>
<th>Approval by:</th>
<th>Date Approved (mm/dd/yy)</th>
<th>Revised Contract Amount</th>
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<tbody>
<tr>
<td></td>
<td>Original Contract</td>
<td>$480,000.00</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Amend 1 to add funds</td>
<td>$520,000.00</td>
<td></td>
<td>y</td>
<td>06/27/18</td>
<td>$1,000,000.00</td>
</tr>
</tbody>
</table>

Total CCO Amount and Time Extension To-Date: $520,000.00 06/27/18 $1,000,000.00
This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and West Coast Code Consultants, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
   "June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars ($1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

West Coast Code Consultants, Inc.
Contractor’s Name (If other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Date

Giyan Senaratne Principal / CEO

Printed Name and Title of Person Signing

2400 Camino Ramon, Suite 240, San Ramon, CA 94583

Address

CITY OF STOCKTON

Date

Laurie Montes, Acting City Manager

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY:

(Rev. 6.6.19)
**CONTRACT ROUTING FORM**

**Contract Number**: 2017-06-20-1103 NP AMENDMENT #2

**CITY CONTRACT TYPE** (select one)
- [ ] Original
- [X] Amendment/Change Order
- [ ] Grant
- [ ] Subdivision Agreement
- [ ] Other

**CONTRACT INFORMATION**
- **Contract Amount**: $1,700,000
- **Contract Title**: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES
- **Vendor/Other Party**: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
- **Contract Start Date**: 07/19/17
- **Contract End Date**: 06/30/21
- **Contract Term**: 48 Months

**COUNCIL APPROVAL REQUIRED?** [ ] Yes [ ] No (provide account # if no)
- **Council approval required for contracts over $75,000** for FISCAL YEAR: 2019/20
- **Motion/Resolution/Ordinance No.**: 2017-06-20-1103, 2019-10-29-1104
- **Must be Attached** [ ]

**REQUIRED DOCUMENTS** (The following documents shall be submitted with the signed contract when required):
- **Business License Required?** [ ] Yes [ ] No
- **Business License No.**: 4Leaf-20-00078218, BV-20-00127671
- **Bonds Required?** [ ] Yes [ ] No
- **Bonds #**: CSG-20-00114727, WC3-20-00127495
- **Insurance Required?** [ ] Yes [ ] No
- **Notary Required?** [ ] Yes [ ] No
- **Recodration Required?** [ ] Yes [ ] No

**Mandatory Routing Order**

| **1 DEPARTMENT**: Community Development |
| **PROJECT MGR.**: Heather McPhee |
| **EX.**: 8316 |
| **STAFF**: Marina Lemos (Procurement) |
| **DATE**: 1/11/19 |
| **FORWARDED TO**: Marina Lemos |
| **DATE**: 1/12/19 |

| **2 PROCUREMENT** |
| **APPROVED** |
| **NAME/SIGNATURE**: Marina Lemos |
| **DATE**: 1/12/19 |
| **FORWARDED TO**: Marina Lemos |
| **DATE**: 1/12/19 |

| **3 VENDOR/OTHER PARTY** |
| **SIGNED** |
| **DATE**: 1/12/19 |
| **FORWARDED TO**: Marina Lemos |
| **DATE**: 1/12/19 |

| **4 RISK SERVICES** |
| **INSURANCE**: by 12/18/19 |
| **BONDS**: by 12/18/19 |
| **FORWARDED TO**: by 12/18/19 |
| **RM #:** 20-198 |

| **5 CITY ATTORNEY** |
| **APPROVED AS TO FORM AND CONTENT**: by 12/18/19 |
| **FORWARDED TO**: by 12/18/19 |
| **DATE**: 1/21/19 |

| **6 CITY MANAGER** |
| **SIGNED BY CITY MANAGER**: by 1/21/19 |
| **FORWARDED TO**: by 1/21/19 |
| **DATE**: 1/21/19 |

| **7 CITY CLERK** |
| **CITY CLERK ATTESTED**: by 1/21/19 |
| **RETURNED ORIGINALS TO DEPT.**: by 1/21/19 |
| **RETIRED** (4) ORIGINALS FOR CITY'S FILE |
| **HARD COPY ON FILE?** [ ] Yes [ ] No |

| **8 ORIGINATING DEPARTMENT** |
| **REQUISITION NO.** |
| **ORIGINAL SENT TO VENDOR**: by |
| **COPY OF CONTRACT TO BE RETAINED BY DEPARTMENT** |
| **ORIGINAL ON FILE IN THE CLERK'S OFFICE** |
| **COPY OF CONTRACT SENT TO PURCHASING** |

**PROCUREMENT**: Purchase Order No. | PUR No. | 4 originals retained = each of 4 vendors
MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add $520,000 bringing the total contract amount to $1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional $700,000 for a total of $1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.

SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

Attachments:
A. PSA Amendment 1
   Contract 2017-06-20-1103  NP Amendment 1
   Contract 2017-06-20-1103-01 NP Amendment 1
   Contract 2017-06-20-1103-02 NP Amendment 1
   Contract 2017-06-20-1103-03 NP Amendment 1

B. PSA Original
   Contract 2017-06-20-1103  NP
   Contract 2017-06-20-1103-01 NP
   Contract 2017-06-20-1103-02 NP
   Contract 2017-06-20-1103-03 NP

4Leaf - Professional Services Master Agreement
Bureau Veritas North America Inc - Professional Services Agreement
CSG Consultants - Professional Services Agreement
West Coast Code Consultants WC3 - Professional Services Agreement
City of Stockton

Legislation Text

File #: 19-5883, Version: 1

MOTION- 2019-10-29 - 1104

AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
   a. 4LEAF, Inc. Fair Oaks, CA;
   b. Bureau Veritas North America, Inc. Sacramento, CA;
   c. CSG Consultants, Inc. Sacramento, CA;
   d. West Coast Code Consultants, Inc. San Ramon, CA

2. Increase funding for individual projects by $700,000 for a revised amount not to exceed $1,700,000 across the entire vendor pool; and

3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed $1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.
DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled $480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by $520,000; bringing the total to $1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the $1 million contract total ($480,000 original contract and $520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, $320,000 was expended the first year and $400,000 was expended the second year. This leaves $280,000 remaining for FY 2019-20. At the current expenditure rate which averages $40,000 per month, the forecasted rate of expenditure will require an additional $700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

- FY 2014/15 - $212 million
- FY 2015/16 - $303 million
- FY 2016-17 - $308 million
- FY 2017-18 - $408 million
- FY 2018-19 - $441 million

Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, $419 million and $427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional $700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add $220,000 to the $280,000 remaining in FY 2019-20, and provide a total amount of $500,000 for FY 2019-20 and $480,000 for FY 2020-21.
As stated, $280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

**FINANCIAL SUMMARY**

There is sufficient budget in account 048-1830-510 for the $500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

Attachment A - Master Services Agreement 2017-06-20-1103 NP
Attachment B - Master Services Agreement Amendment 1
Attachment C - Permit Activity Chart
Attachment D - Proposed Master Services Agreement Amendment 2
## CHANGE ORDER CALCULATOR

**Vendor:** 4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc  
**Dept:** CDD  
**Project #:** Master On-Call Bldg Services PUR 17-001  
**Date:** 12/05/19  
**PO Number:** 201263 - 201266  
**Account Number:** 048-18-530.20-65

**Original Contract Amount:** $480,000.00  
**Original Contract Award Date:** 07/19/17  
**Original Contract Expiration Date:** 06/30/20

**Contract Amount to date:** $1,700,000.00  
**Authorized CCO Amount to date:** $1,220,000.00  
**Available CCO Funding:**  
**Contract Expiration to date:** 06/30/21

---

**ENTRIES IN BOLD RED INDICATE**  
**YOUR BALANCE OF CM AUTHORITY CCO AMOUNT IS EXCEEDED.**  
**YOU MUST GO TO COUNCIL FOR APPROVAL.**  
(Effective 2/26/15: CM Authority = $75,000)

<table>
<thead>
<tr>
<th>CCO No.</th>
<th>Description</th>
<th>Requested CCO Amount</th>
<th>Time Extensions</th>
<th>Required Approval by:</th>
<th>Date CC Approved (mm/dd/yy)</th>
<th>Revised Contract Amount</th>
<th>Revised CCO Authority Balance</th>
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<tbody>
<tr>
<td></td>
<td>Last Council Action</td>
<td>$520,000.00</td>
<td></td>
<td></td>
<td></td>
<td>$1,000,000.00</td>
<td>$165,000.00</td>
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<td>Total approved CCOs since last Council Action</td>
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<td></td>
<td></td>
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| NEW PROPOSED CCOs | | | | | | |
| 2 Increase Funding | $700,000.00 | | | | | $1,700,000.00 | $235,000.00 |
| 2 Contract extended 6/30/21 | 12 | | | | | |

**Total CCO Amount and Time Extension To-Date** $1,220,000.00  
12
<table>
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<th>CCO No.</th>
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<th>Requested CCO Amount</th>
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</thead>
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<td>1</td>
<td>Amend 1 to add funds</td>
<td>$480,000.00</td>
<td>$520,000.00</td>
<td>$1,000,000.00</td>
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**PO No**: 0485-18-91-20-05

**Contract No**: 201263 - 201266

**Date**: 06/06/19

**Contract Amount**: $480,000.00

**Contract Expiration Date**: 06/06/20

**Account Number**: 3207/09/19

**Contract Award Date**: 07/07/17
This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and 4LEAF, Inc. "Contractor".

**RECITALS**

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $400,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
   "June 30, 2022"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed Two Million One Hundred Thousand Dollars ($2,100,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

**IN WITNESS WHEREOF, the authorized parties have executed this Agreement.**

**CONTRACTOR**

Contractor’s Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Date

Printed Name and Title of Person Signing

Address

**CITY OF STOCKTON**

Harry Black, City Manager

Date

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY:

(Rev. 6.6.19)
### Section 3: Professional Services Fees

<table>
<thead>
<tr>
<th>Service</th>
<th>Fee</th>
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<tr>
<td>Civil Engineer</td>
<td>$120.00</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$120.00</td>
</tr>
<tr>
<td>Building Official</td>
<td>$135.00</td>
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<tr>
<td>Plan Reviewer</td>
<td>$90.00</td>
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<td>CASp Plan Reviewer/Inspector</td>
<td>$155.00</td>
</tr>
<tr>
<td>Fire Plan Reviewer/Inspector</td>
<td>$155.00</td>
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<tr>
<td>OSHPD 3 Plan Review/Certification</td>
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<tr>
<td>Certified Floodplain Manager</td>
<td>$135.00</td>
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<tr>
<td>Combination Inspection</td>
<td>$95.00</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$65.00</td>
</tr>
</tbody>
</table>
This Amendment Number 3 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and Bureau Veritas North America, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $400,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to: "June 30, 2022"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed Two Million One Hundred Thousand Dollars ($2,100,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

Contractor’s Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Date

Printed Name and Title of Person Signing

Address

CITY OF STOCKTON

Harry Black, City Manager

Date

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:
John M. Luebberke, City Attorney

BY:
SCHEDULE OF FEES - REVISED 5/23/2017

Our pricing reflects our commitment to the success of your project by helping you maintain significant quality and cost saving benefits moving forward.

These include:
- Reduced plan review turnaround times and quick inspection response time
- Commitment to maintain a proposed rate structure for the life of the initial contract period
- Highly qualified staff
- Confidence of working with a well-established consultant in business for 185+ years
- Next day inspections
- Same day inspections for urgent matters

Hourly rates for project personnel are outlined below:

<table>
<thead>
<tr>
<th>Staff Level Classifications</th>
<th>Hourly Billing Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structural Engineer</td>
<td>$130</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$120</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$120</td>
</tr>
<tr>
<td>Building Official</td>
<td>$130</td>
</tr>
<tr>
<td>Plan Reviewer</td>
<td>$105</td>
</tr>
<tr>
<td>CASp Plan Reviewer/Inspector</td>
<td>$110</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review/Certification</td>
<td>$125</td>
</tr>
<tr>
<td>Certified Floodplain Manager</td>
<td>$130</td>
</tr>
<tr>
<td>Combination Inspection</td>
<td>$100</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$70</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>$65</td>
</tr>
<tr>
<td>Fire Plan Review</td>
<td>$120</td>
</tr>
</tbody>
</table>

*Pricing assumes that this contract is non-prevailing wage - for any prevailing wage projects, BVNA will discuss rates with the City to account for the California Prevailing Wage requirements.

Overtime: All Employees classified as “non-exempt” by the U.S. Department of Labor will be compensated at 1-1/2 times salary for overtime hours as per State and Federal wage and hour laws. No overtime will be charged without prior consent.

This fee proposal is valid from January 1, 2017 thru December 31, 2017 and is subject to annual review and adjustment, with the approval of the City.
This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton (“City”) and CSG Consultants, Inc. “Contractor”.

**RECITALS**

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $400,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to: “June 30, 2022”

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

   Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed Two Million One Hundred Thousand Dollars ($2,100,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in Exhibit A (4LEAF, Inc.), Exhibit B (Bureau Veritas North America), Exhibit C (CSG Consultants, Inc.), and Exhibit D (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant’s invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

**IN WITNESS WHEREOF, the authorized parties have executed this Agreement.**

**CONTRACTOR**

Contractor’s Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Date

Printed Name and Title of Person Signing

Address

**CITY OF STOCKTON**

Harry Black, City Manager

Date

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY:
Professional Services Fees

CSG’s fee schedule for proposed work is provided in the table below. All plan review services will be performed at CSG’s office. CSG will coordinate the pickup and return of all plans to CSG via staff or a licensed courier service. This service is provided at no additional cost.

Plan review based on a percentage of the City’s plan check fee includes initial plan review and two subsequent reviews. Additional reviews will be charged at the appropriate hourly rate indicated below.

**FEE SCHEDULE**

<table>
<thead>
<tr>
<th>SERVICE / ROLE</th>
<th>FEE / HOURLY RATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Plan Review by Percentage</td>
<td>65% of City’s Building Plan Check Fees</td>
</tr>
<tr>
<td>Expedited Plan Review by Percentage</td>
<td>95% of City’s Building Plan Check Fees</td>
</tr>
<tr>
<td>Structural Engineer</td>
<td>$150</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$185</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$125</td>
</tr>
<tr>
<td>Building Official</td>
<td>$125</td>
</tr>
<tr>
<td>Building Plan Reviewer</td>
<td>$85</td>
</tr>
<tr>
<td>Fire Plan Reviewer</td>
<td>$95</td>
</tr>
<tr>
<td>CASp Plan Reviewer/Inspector</td>
<td>$125</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review/Certification</td>
<td>$110</td>
</tr>
<tr>
<td>Certified Flood Plain Manager</td>
<td>$200</td>
</tr>
<tr>
<td>Combination Inspection</td>
<td>$85</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$60</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>NA</td>
</tr>
</tbody>
</table>

All hourly rates include overhead costs including, but not limited to, salaries, benefits, Workers Compensation Insurance, and office expenses. Should the scope of work change or circumstances develop which necessitate special handling, we will notify the City prior to proceeding. Annual adjustments may be made by mutual agreement based upon current CPI. CSG will mail an invoice at the beginning of every month for services rendered during the previous month.
This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton (“City”) and West Coast Code Consultants, Inc. “Contractor”.

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by $400,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
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CONTRACTOR

Contractor’s Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature Date

Printed Name and Title of Person Signing

Address

CITY OF STOCKTON

Harry Black, City Manager Date

ATTEST:

Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY:

(Rev. 6.6.19)
SERVICE FEES

Professional Service Fees

WC proposes the following fees based on a percentage of the plan review fees:

<table>
<thead>
<tr>
<th>Plan Review Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Building Plan Review</td>
<td>65%</td>
</tr>
<tr>
<td>Structural Only Plan Review</td>
<td>45%</td>
</tr>
<tr>
<td>Architectural Only Plan Review</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Classification</th>
<th>Hourly Billing Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structural Engineer</td>
<td>$125.00</td>
</tr>
<tr>
<td>Civil Engineer</td>
<td>$115.00</td>
</tr>
<tr>
<td>Plan Review Engineer</td>
<td>$110.00</td>
</tr>
<tr>
<td>Building Official</td>
<td>$130.00</td>
</tr>
<tr>
<td>Plans Examiner</td>
<td>$100.00</td>
</tr>
<tr>
<td>Fire Plans Examiner</td>
<td>$105.00</td>
</tr>
<tr>
<td>Fire Protection Engineer</td>
<td>$115.00</td>
</tr>
<tr>
<td>CASp Plan Reviewer/Inspector</td>
<td>$150.00</td>
</tr>
<tr>
<td>OSHPD 3 Plan Review</td>
<td>$100.00</td>
</tr>
<tr>
<td>Senior Inspector</td>
<td>$99.00</td>
</tr>
<tr>
<td>Inspector III</td>
<td>$94.00</td>
</tr>
<tr>
<td>Inspector II</td>
<td>$89.00</td>
</tr>
<tr>
<td>Inspector I</td>
<td>$79.00</td>
</tr>
<tr>
<td>Permit Technician</td>
<td>$65.00</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>$55.00</td>
</tr>
<tr>
<td>Instructor (In House Staff Training)</td>
<td>Starting at $750/class</td>
</tr>
<tr>
<td>Overtime on Hourly Rates (if required)</td>
<td>150% of Hourly Rate</td>
</tr>
</tbody>
</table>

* Four (4) Hour minimum on all in house work

Plan review services include an initial review, second review and a third review (if needed) for approval of the plans. Any additional time required beyond the third plan review will be billed on an hourly basis, with prior approval by the City, per the Schedule of Hourly Billing Rates (see left).

Pick-up and delivery fees are not charged to the City but processed through WC's established account. Preliminary plan reviews, review of revisions after a project has been approved, review of shop drawings, and review of deferred submittals will be completed on an hourly basis with a mutually acceptable not-to-exceed amount.

For expedited or fast-track projects requested by the City of Stockton, we propose a fee of 150% of the above noted fees.