

TO: JAMES L. APP, CITY MANAGER
FROM: BOB LATA, COMMUNITY DEVELOPMENT DIRECTOR *BL*
SUBJECT: AWARD OF CONTRACT FOR ZONING CODE REWRITE
DATE: FEBRUARY 15, 2000

Needs: For the City Council to consider award of a consultant services agreement for a re-write of the City's Zoning Code.

- Facts:
1. As a part of the FY 1999-2000 Budget, the City Council set aside \$50,000 to undertake a re-write of the City's Zoning Code and, if feasible, the balance of the Municipal Code.
 2. The City sent out a Request for Proposals (RFP) to three qualified firms with substantial experience in preparing Zoning and other Code provisions. A copy is attached. The RFP sought proposals in two parts:
 - a. A re-write of the Zoning Code; and
 - b. A re-write of the balance of the Municipal Code.
 3. Attached is a copy of a proposal by Crawford, Multari, Clark & Mohr.

Analysis
and
Conclusion:

In preparing the budget request for \$50,000, it had been anticipated that the work on the Zoning Code would be about \$32,000. There had been no cost estimate for rewriting the balance of the Municipal Code.

The proposal from Crawford, Multari, Clark & Mohr proposes to complete the Zoning Code rewrite within the budget estimate for phase 1. To rewrite the balance of the Municipal Code would exceed the current budget allocation.

The structure of the RFP anticipated that work on the Zoning Code re-write would be the phase 1 priority project, and that a rewrite of the balance of the Municipal Code would be done as a separate later project, if and when resources would be available.

Proceeding at this time with a rewrite of the Zoning Code will address the priority concern. Once the Zoning Code is complete, the City can then determine whether or not to allocate additional funding (about \$16,000) to proceed with phase 2.

The proposal from Crawford, Multari, Clark & Mohr demonstrates the level of experience and expertise necessary to undertake a rewrite of the City's Zoning Code. Whether or not to proceed with the Municipal code rewrite would be deferred until completion of the Zoning Code rewrite.

Policy
Reference: Zoning Code

Fiscal
Impact: Adequate funding has been allocated in the FY-1999-2000 Budget for phase 1 of the project (the Zoning Code rewrite). Council authorization for additional funding would be sought before proceeding with phase 2 (the Municipal Code rewrite).

- Options:
- a. That the City Council authorize execution of a consultant services agreement with Crawford, Multari, Clark & Mohr to prepare the Zoning Code rewrite, for a cost of not to exceed \$31,800. (Consideration of whether or not to proceed with the second phase of the project, a rewrite of the balance of the Municipal Code, would be deferred until after completion of the Zoning Code rewrite.)
 - b. Amend, modify or reject option "a".

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REQUEST FOR PROPOSALS
TO RE-WRITE ZONING AND MUNICIPAL CODES
CITY OF PASO ROBLES

INTRODUCTION:

The City of El Paso de Robles is requesting proposals from qualified consultant firms to re-write the City's codes in a two-step process:

1. To re-write the City's Zoning Code; and
2. To re-write the City's Municipal Code

The purpose and intent is to create a set of codes that are clear and easy to read, internally consistent, and which provide graphical illustrations that enhance the public's understanding of the code requirements. No changes in City policy or standards are envisioned as a part of this re-write.

Relevant expertise and experience in the process of re-writing Zoning and Municipal Codes is required. Examples of applicable experience are to be submitted.

The City utilizes "Book Publishing Company" as its agent for publication of the City's codes. A copy of the City's codes can be found at www.bpcnet.com/codes/elpderobles.htm

The consultant will be required to coordinate its efforts with Book Publishing Company to insure that the re-write can be integrated into their publication system.

The City's Zoning Code is a subset of the City's Municipal Code. Both codes, but particularly the Zoning Code, have been the subject of piece-meal amendments and revisions resulting in internal inconsistencies.

Re-writing the City's Zoning Code is the first priority. Dependent upon costs and the success of the Zoning Code re-write, the City will authorize the second part, a re-write of the balance of the Municipal Code.

The City is committed to the timely preparation and completion of this project. The consultant will be responsible for procurement / creation of all graphic elements. The City's intent is to have a set of codes prepared that is terse/concise and, at the same time, technically and legally adequate.

SCOPE OF WORK:

Part One: To re-write the City's Zoning Code to substantially improve its clarity through a combination of graphics and text simplification; to improve the terseness, and to eliminate internal inconsistencies. No changes in City policies are to occur except as is necessary to eliminate inconsistencies between conflicting provisions. Specific details:

1. The current Zoning Code and Municipal Code will be made available on CD-ROM. The product of the consultant's efforts is to be provided to the City on a CD-ROM in a format that will be acceptable to Book Publishing Company and shall include all Zoning Code amendments effective on / by a mutually agreeable date.
2. The current Zoning Code and Municipal Code are also accessible to the public on a web site maintained by Book Publishing Company. It is the City's intent to have the re-written Zoning Code also available on the web site, including all graphic examples. Formatting of the Zoning Code and graphic examples needs to anticipate this intent.
3. The consultant will be responsible for identifying the number of specific graphic examples that are to be provided in the Zoning Code. All graphic examples shall be of high design quality, easy to read, and easy to reproduce from either the original CD-ROM or via the Internet.

Part Two: Upon completion and acceptance of the re-written Zoning Code, the City will determine whether or not to proceed with a re-write of the Municipal Code. The effectiveness of the Zoning Code product, along with the incremental cost of re-writing the balance of the Municipal Code, will be factors in the City's decision. The same specific details regarding the Zoning Code shall apply to the balance of the Municipal Code.

CITY RESPONSIBILITIES:

The City will mail and arrange for newspaper publishing of all required hearings and mailing of public notices for a Zoning Code Amendment to adopt a new Zoning Code. The City will be responsible for duplicating and mailing all draft and final documents to persons on the mailing list.

Meetings with City staff to obtain information and to review the preliminary draft will be scheduled by the consultant. Because of staffing limitations, the consultant should not expect or plan for City staff to collect information or provide other work product support for this project. City staff will, however, provide reasonable assistance in terms of identifying any available information and its sources. The City will provide the most recent CD-ROM copy of the codes, and copies of subsequent ordinances.

The City will also provide the consultant with a preliminary list of identified inconsistencies in the Zoning Code. However, the consultant will be expected to review the existing document and provide appropriate additional suggestions for modifications / refinements to eliminate conflicts and improve the clarity of the code.

PRODUCTS AND SCHEDULE FOR COMPLETION:

The consultant will provide the following reports to the Community Development Director. These reports will be part of the schedule which will be prepared at the start-up meeting with city staff:

- a. Monthly verbal status reports, starting one week after execution of the approved contract.
- b. A Preliminary Draft Zoning Code to be submitted to the Community Development Director within a fixed number of days after execution of the approved contract.
- c. A Revised Draft Zoning Code to be submitted for public review and comment within a fixed number of days after execution of the contract.
- d. A Final Zoning Code reflecting response to comments to be submitted to the Community Development Director within a fixed number of days after execution of the contract.

All draft copies of the Zoning Code shall be provided in two forms: (1) in 8½" x 11" size, single-sided master format, suitable for photocopying. All graphics, figures, maps, charts, etc., must be reduced to an 8½" x 11" format unless previously agreed upon by the City. (2) a CD-ROM copy in a format that can be utilized with MS-Word on a Windows NT Network and which is acceptable to Book Publishing Company.

BUDGET:

The consultant shall submit a fixed budget amount to cover all the foregoing services for preparation of the two-part project. The budget will show a separate break-out for Part 1 (the Zoning Code) and Part 2 (the balance of the Municipal Code). The consultant should assume two (2) public hearings of two hours each for the Zoning Code, and one public hearing of two hours duration for the Municipal Code. Administration costs, consultant time and expenses for attendance at meetings, public hearings, etc., shall be reflected as individual and separate line items. Additional costs shall be itemized by line item for:

- Travel expenses (realistic estimates; may not be exceeded without City approval);
- Hourly rate for additional work beyond the described scope of work;
- Any additional charges not identified in the Scope of Work outlined above but recommended by the consultant as necessary to complete the re-write tasks.

PAYMENT SCHEDULE

Payment of consultant services will be made according to the following schedule:

- 20% of the contract fee will be paid upon execution of the contract.
- 30% of the contract fee will be paid upon submittal of an acceptable Preliminary Draft Zoning Code.
- 30% of the contract fee will be paid upon submittal of an acceptable Draft Zoning Code for public review and comment.
- 20% of the contract fee will be paid upon certification of the Final Zoning Code by the City Council including all responses to comments to the draft Zoning Code as necessary, and the required papers, maps / plans, and all work on disk per specifications.

Statements received prior to the City's monthly deadline will be processed and paid at the end of that calendar month. Invoices received after that date will be paid with the following month's statements. No partial payments for services rendered to that date will be paid. The City reserves the right to withhold payment or to delay payment in full based on these criteria:

- Products, drafts are not adequately prepared as outlined in the scope of work;
- Products are not delivered to the City according to the time schedule.

RESPONSE TO REQUEST FOR PROPOSALS:

The response to this RFP shall contain the following elements:

1. A statement reflecting the consultant's understanding of the scope of the issues to be addressed including an outline of the proposed approach towards preparation of the Zoning Code and Municipal Code re-write, including the minimum number of graphic examples that will be provided.
2. Information on the firm's qualifications and experience in preparing studies for similar projects. The information should include the following:
 - a. Identification, qualifications, and experience of all persons to be assigned to the project; particularly identify the project manager and contact person;
 - b. Identification of available support resources and qualifications of any subcontracting consultants, including resumes or qualifications of individuals or the firm as applicable;
 - c. Copies of two (2) examples of Zoning Code re-write projects of similar class and nature. These must be copies that either do not need to be returned, or it will be the responsibility of the consultant to make arrangements to return the documents at the consultant's cost.

3. Budget to include the following:

- a. A firm cost to complete the described work in two parts, accompanied by the estimated hours upon which the cost is based;
- b. Hourly rates for each person assigned and any flat rates for subcontracted work;

4. Identification of any errors and omissions insurance coverage the firm may have.

5. Any and all exceptions from the scope of work described by this RFP.

6. Signature line, with name and title of signatory; firm, address, and telephone number.

7. Two (2) copies of the proposal, in 8½" x 11" format shall be submitted.

8. A Schedule for Completion, based on the consultant / team starting work on the re-write within two weeks after executing the contract, and providing this specific information:

- Date for submitting Preliminary / Administrative Draft of the Zoning Code
- Date for submitting the Public Draft of the Zoning Code (based on when the City responds with comments on the Preliminary / Administrative Draft)
- Date for submitting the Final Zoning Code (based on when the City provides the consultant with comments on the Public Draft of the Zoning Code)

DEADLINE FOR RESPONSE:

The response to this Request for Proposal is to be received by the Community Development Department by 5:00 PM on Friday, January 21, 2000. Responses received after the specified time and date may not be considered. Respond to:

Community Development Director, City of El Paso de Robles
1000 Spring Street, Paso Robles, CA 93446-2599

On the envelope/package, please clearly label "Zoning Code Re-Write". Delivery of responses may be made to the second floor of Library/City Hall at 1000 Spring Street, Paso Robles, CA 93446.

CONTRACT REQUIREMENT:

The consultant who is chosen shall execute a written contract with the City within seven (7) calendar days after notice of selection has been sent by first class mail to the address provided in the response to the RFP (An example of the City's standard contract is attached).

NON-EXCLUSIVE CONTRACT:

The City reserves the right to contract with other consultants during the contract term.

SELECTION PROCESS:

1. Selection of the consultant will be based on demonstrated expertise and experience, the ability to produce the desired product in the specified time frame, a demonstrated record of satisfactory work performed on projects of similar scale and nature, project approach, the completeness in responding to this Request for Proposals, and the proposed fees for services.
2. The most qualified firm will be selected by the City staff and subject to Council confirmation; an interview may be required during the period between January 24, and February 11, 2000.
3. The City reserves the right to reject any or all proposals, and to negotiate modifications or acceptance of parts of a proposal. Other terms and conditions of contract will be negotiated at the time of the consultant selection and will be subject to approval of the City Attorney.
4. All proposals submitted to the City in response to this RFP become the property of the City.
5. Upon completion of the Study, all documents and other products become the property of the City, including source documents and working notes.

FURTHER INFORMATION ON THE RFP:

Please contact Bob Lata in the Community Development Department at (805) 237-3970 [fax: (805) 237-6565, or e-mail: bob@prcity.com] should you have questions or need further information regarding the RFP. Meg Williamson, Principal Planner, is the alternative contact person at the same voice and fax numbers.

Attachments / Enclosures: Standard City / Consultant Contract

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Crawford
Multari
Clark &
Mohr

641 Higuera Street, Suite 302
San Luis Obispo, CA 93401
Phone 805.541.2622
FAX 805.541.5512

424 Second Street, Suite D
Davis, CA 95616
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www.cmcaplans.com
E-Mail: cmca@cmcaplans.com

JAN 21 2000

January 20, 2000

Bob Lata, Director
Community Development Department
City of El Paso de Robles
1000 Spring Street
Paso Robles, CA 93446-2599

RE: ZONING AND MUNICIPAL CODES REWRITE

Dear Mr. Lata:

We are pleased to submit this proposal to assist the City in the rewriting and reformatting of the Paso Robles Zoning Code and Municipal Code. We are especially interested in this project because it will involve exactly the type of work that utilizes our experience and talent most effectively, and that can take advantage of our proximity to Paso Robles.

We believe our firm has uniquely extensive experience in the preparation of development ordinances. In addition, our experience as consultants, and previous work as planning directors and planning department line staff, has covered all aspects of the day-to-day administration of development regulations. Therefore, we understand the practical details that must be considered in the reorganization, reformatting, and rewriting of development regulations and other codes; and our ordinance drafting is informed by our continuing experience in ordinance administration and permit processing assistance for city and county clients.

We share the City's objectives for a high quality document that is both effective, and user friendly, clear and concise, visually/graphically enhanced, and easy to administer, enforce, and amend.

We particularly enjoy working closely with staff in code preparation, and are confident that our past clients will report satisfaction with the quality, timeliness, and reasonable cost of our work, as well as the working relationships we have established with them. The fact that many of our past clients have engaged us for additional work demonstrates our ability to satisfy our clients' needs.

We hope to have the opportunity to work with you on this project, and look forward to discussing our proposal with you further. We are available to begin the project immediately.

Sincerely,



Paul C. Crawford, AICP
Principal

PLAN 2 1 2000

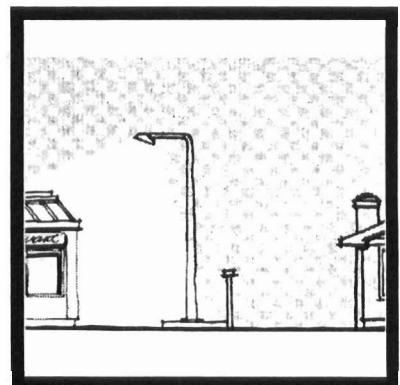
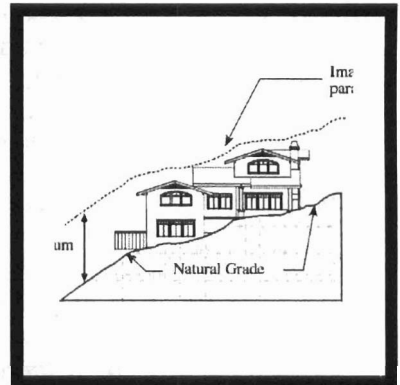
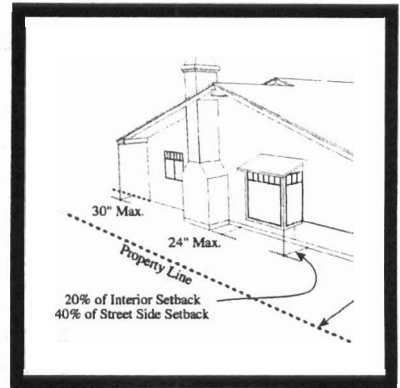
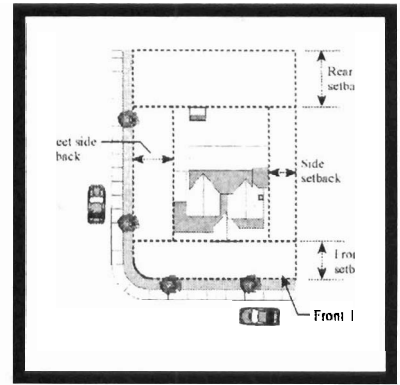
Proposal for Professional Services

City of El Paso de Robles

ZONING AND MUNICIPAL CODES REVISION

January 21, 2000

Crawford Multari Clark & Mohr
planning • economics • public policy



Proposal for
ZONING AND MUNICIPAL CODES REVISION
CITY OF EL PASO DE ROBLES

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1. CONSULTANT QUALIFICATIONS

A. Consultant Profiles

Paul Crawford, Susan Clark, and CMCM graphics staff will work on the revisions to the Zoning and Municipal Codes. Paul Crawford will serve as project manager and primary liaison with the City.

Paul Crawford, AICP

A principal with Crawford Multari Clark & Mohr, Paul Crawford's planning career has focused on simplifying and clarifying land use regulations for a wide variety of cities and counties, and on designing and implementing computer software and other office automation tools for planning agencies. Before forming Crawford Multari Clark & Mohr, he served from 1980 to 1990 as both Director of Planning and Building for San Luis Obispo County, and Executive Director of the San Luis Obispo Council of Governments (COG). Those positions followed five years of service to San Luis Obispo County in four other staff assignments, prior consulting work, and a staff position with the City of Visalia.

His professional research interests are in the drafting of zoning, development, and subdivision regulations and designing planning agency computer applications. Crawford earned his B.S. degree in City and Regional Planning at California Polytechnic State University in San Luis Obispo, where he now teaches several courses, including Introduction to Urban Planning, Planning Administration, and Planning Agency Management. He was selected by the Cal Poly School of Architecture and Environmental Design as 1990-91 Honored Alumnus. He also serves on the faculty of U.C. Davis Extension, and U.C.L.A. Extension, where he teaches professional development courses in geographic information systems (GIS), and zoning ordinance preparation.

Paul Crawford's work on the San Luis Obispo County Land Use Ordinance was recognized by an award from the California Chapter of the American Planning Association in 1981, and the work of Crawford Multari Clark & Mohr has been recognized by six additional awards from the California Chapter of the American Planning Association. Crawford was elected to the California Planning Roundtable in 1993, and is currently its president. He received the Award of Excellence for Distinguished Leadership as a Planning Professional from California Chapter of the American Planning Association in 1998. He is a member of the American Planning Association (APA), the American Institute of Certified Planners (AICP), the Congress for the New Urbanism (CNU), the Association of Environmental Professionals (AEP), and the Urban and Regional Information Systems Association.

Susan Clark, AICP

Susan Clark's work at Crawford Multari Clark & Mohr has emphasized zoning code drafting, land use planning, environmental evaluations, and other special studies. She has collaborated on the preparation of over 20 development and zoning codes for communities state-wide. Susan has worked on many general plan updates for cities and counties of varying size and population, both within and outside the coastal zone. Her general plan work has focused on agricultural, resource conservation, and housing issues, and has included the preparation of Land Use, Open Space, Conservation, Housing, and Recreation Elements.

Ms. Clark has completed project site planning, project suitability, design review, and environmental evaluations for large scale commercial and housing developments. She has also worked on and prepared environmental impact reports and mitigated negative declarations for a variety of public and private projects, and special studies on solid waste management, low-income housing, and market feasibility.

Susan is particularly adept at working with the public, community groups, and agency staff assisting in consensus building and identifying and addressing community issues. She has facilitated many public participation workshops and presentations. Susan has coordinated, managed and served as client liaison on several projects.

Susan has been a land use planner since 1990, when she worked in current planning for the City of Atascadero. In this capacity, Susan conducted development project and design review, and drafted land use ordinances.

Susan was an honors student at California Polytechnic State University, San Luis Obispo, where she received her Bachelor of Arts degree in Political Science and, in 1995, a Masters degree in City and Regional Planning. Her graduate studies focused on incorporating aesthetic, environmental, and economic factors in successful urban design and development. Ms. Clark is a member of the American Planning Association (APA), American Institute of Certified Planners (AICP), Congress for the New Urbanism (CNU), and is a former Board member of the Environmental Center of San Luis Obispo.

B. Relevant Zoning Ordinance and Code Experience

Crawford Multari Clark & Mohr (CMCM) has been responsible for the preparation of over 40 zoning and development codes, subdivision ordinances, and design guidelines documents. Paul Crawford and Susan Clark provide extensive experience in ordinance drafting and administration as both consultants and prior city and county staff. On various previous and current projects they have teamed with Moule & Polyzoides (M&P), Jacobson & Wack (J&W), and Urban Design Studio (UDS). This extensive body of work includes the following projects, some of which are work in progress.

- Coastal Zoning Ordinance, City of Guadalupe (CMCM)
- Coastal Zoning Ordinance, City of Pacific Grove (CMCM)
- Coastal Zoning Ordinance, San Luis Obispo County (Crawford)
- Code of Ordinances reorganization, Moss Landing Harbor District (CMCM)
- Code of Ordinances reorganization, Port San Luis Harbor District (CMCM)
- Design Guidelines, City of Buellton (CMCM)
- Design Guidelines, City of San Buenaventura (CMCM)
- Design Guidelines, City of Woodland (CMCM)
- Design Guidelines, County of San Luis Obispo (CMCM)
- Design guidelines as part of the following development codes, as noted
- Development Code (zoning/subdivision/design), City of Azusa (CMCM)
- Development Code (zoning/subdivision/grading), City of Calabasas (CMCM)
- Development Code (zoning/subdivision/design), City of Chico (CMCM, J&W)
- Development Code (zoning/subdivision/design), City of Diamond Bar (CMCM, J&W)
- Development Code (zoning/subdivision), City of Hollister (CMCM, J&W)
- Development Code (zoning/subdivision), City of Lodi (CMCM, J&W)
- Development Code (zoning/subdivision/design), City of Lompoc (CMCM, J&W)

Development Code (zoning/subdivision/design), City of Simi Valley (CMCM, J&W)
Development Code (zoning/subdivision/design), City of Sonoma (CMCM, J&W)
Development Code (zoning/subdivision), City of Stockton (CMCM, J&W)
Development Code (zoning/subdivision), County of Marin (CMCM, J&W)
Development Code, Lake Havasu City, Arizona (CMCM, J&W)
Development Code (zoning/subdivision/design), Town of Truckee (CMCM, J&W)
Land Use Ordinance, County of San Luis Obispo (Crawford)
Land Use Ordinance update, County of San Luis Obispo (CMCM)
Neotraditional Design Options Model Ordinance, San Luis Obispo County COG (CMCM)
Neotraditional Design Options Ordinance/Design Guidelines, City of Paso Robles (CMCM)
Zoning Ordinance, City of Azusa (CMCM)
Zoning Ordinance, City of Buellton (CMCM)
Zoning Ordinance, City of Culver City (CMCM, J&W)
Zoning Ordinance, City of Desert Hot Springs (CMCM, J&W)
Zoning Ordinance, City of Fountain Valley (CMCM, J&W)
Zoning Ordinance, City of Malibu (CMCM, J&W)
Zoning Ordinance, City of Mountain View (CMCM)
Zoning Ordinance, City of Norwalk (CMCM, J&W)
Zoning Ordinance, City of Novato (CMCM, J&W)
Zoning Ordinance, City of Ojai (CMCM, J&W)
Zoning Ordinance, City of Pasadena (CMCM)
Zoning Ordinance, City of Pismo Beach (CMCM, J&W)
Zoning Ordinance, City of South Pasadena (CMCM, J&W)
Zoning Ordinance, City of Tustin (CMCM, J&W)
Zoning Ordinance, City of West Hollywood (CMCM, J&W)
Zoning Ordinance, County of Placer (CMCM)
Zoning Ordinance, County of Solano (CMCM, J&W)
Zoning Ordinance, Town of Loomis (CMCM, J&W)
Zoning Ordinance, Town of Windsor (CMCM, J&W)
Zoning Ordinance Update Technical Assistance, City of Fairfield (CMCM)
Zoning Ordinance Update Technical Assistance, City of Roseville (CMCM)
Sign Ordinance, City of Buellton (CMCM)
Sign Ordinance, City of Modesto (CMCM)
Sign ordinances as part of all development codes and zoning ordinances listed above
Subdivision Ordinance, City of Buellton (CMCM)
Subdivision Ordinance, Mendocino County (CMCM)
Subdivision ordinances as part of the development codes listed above, where noted

2. WORK PLAN

A. Overall Objectives, Understanding of Project

The objectives of our consultant team in the Paso Robles code revisions are based on both our professional expectations for our own work, and the needs expressed in the City's request for proposals. These objectives include providing the City with comprehensive documents that are: user friendly; written in clear, concise, easy-to-understand language; visually and graphically enhanced with illustrations, tables, and matrices; and easy to administer, enforce, and amend. (The Appendix to this proposal provides a more detailed discussion of our philosophy regarding the preparation of codes that are easy to understand and use.)

B. Scope of Work

Task 1 - Information Collection and Scope Refinement

The consultants must have an in-depth understanding of the City's expectations and objectives for the zoning and subdivision regulations before drafting can begin..

Subtasks:

1.1 Initial staff scoping meetings. The consultants will meet with City staff to:

- Review the City's purposes for the code revisions
- Review with staff provisions of the current codes that highlight the problems that the revisions are intended to address
- Review and discuss overall format and organization alternatives;
- Revise the project scope and schedule as necessary.

PRODUCTS: Revised project scope of work, as necessary.

1.2 Document review and issues inventory. The consultants will review the current City codes to identify any questions that must be resolved prior to drafting the revisions, and to identify various provisions that may need to be relocated within the code, and/or cross-referenced in various sections to improve the efficiency and accuracy of use.

1.3 Working outline, format, style sheets. Based on the input received from staff and the Commission/Council interviews, and the conclusions in the issues inventory, the consultants will prepare a draft annotated outline, style sheet, and sample chapter to illustrate the intended format and style of Title 9. After staff review, the consultants will discuss with staff any desired changes, and direction for the preparation of the chapters covering the zoning district provisions.

PRODUCTS: Title 9 outline and format description; style sheet; sample chapter in tentatively approved format – 10 copies and one reproducible original.

Task 2 - Zoning Code Preparation

For the purposes of this work program, it is suggested that an administrative draft Zoning Code be prepared and delivered in segments, rather than CMCM initially preparing a complete draft for staff review. We have found that most clients' day-to-day workloads can more readily accommodate the periodic review of portions of a revised Zoning Code rather than an entire document. The order and content of the segments can, of course, be modified as desired by staff.

Subtasks:

- 2.1 Zoning district provisions.** The consultants will draft the chapters of the Zoning Code containing regulations applicable in specific zoning districts. The zoning district provisions will be sent to staff for review, after which the consultants and staff will meet to discuss desired changes, and direction for preparing the administrative provisions.

PRODUCTS: Administrative draft zoning district provisions — One reproducible original.

- 2.2 Administrative provisions.** The consultants will draft the Zoning Code provisions covering administration and the filing and processing procedures for land use permit and subdivision applications. A copy of the draft will be transmitted to the staff for review. The consultants will then meet with staff to go over the work and discuss desired changes, and discuss direction for preparation of the general development and specific use standards for the Zoning Ordinance, per Task 2.4.

PRODUCTS: Draft procedural/administrative/permits chapters — One reproducible original.

- 2.3 General regulations.** The consultants will draft the Zoning Code chapters containing regulations that apply in multiple zones, and regulations for specific land uses. Copies of the chapters will be transmitted to staff for review and the consultants will meet with staff after their review to discuss desired changes.

PRODUCTS: Draft general regulations — One reproducible original.

- 2.4 Preliminary draft.** This task will include: revisions to the contents of the administrative draft segments based on previous staff input; preparation of the remaining parts of the draft regulations, including a detailed table of contents; the inclusion of all the graphics and illustrations. We will forward the draft to staff for review and comment. We will meet with staff to review their comments and desired changes.

PRODUCTS: Preliminary Draft—reproducible original.

- 2.5 Screencheck draft.** A Screencheck Draft will be prepared and provided to the City to verify that all requested changes to the Preliminary Draft have been properly completed, and that all final graphics are acceptable.

PRODUCTS: Screencheck Draft— one copy.

- 2.6 Public review draft regulations.** A public review draft will be prepared and provided to the City for public review and hearings.

PRODUCTS: Public Review Draft — reproducible originals.

Task 3 - Public Review and Adoption

Tasks:

- 3.1 Public hearings.** The consultants will attend up to two public hearings to review the draft documents.

- 3.2 Screencheck final regulations.** After adoption of the updated Zoning Code and before its effective date, the consultants will prepare a final version, incorporating any changes made by the City Council. The consultants will provide screencheck version so that the City can verify that the document accurately incorporates all changes approved by the Council during the adoption process.

PRODUCTS: Screencheck Final Regulations — one copy.

- 3.3 Final regulations.** The consultants will prepare a final version of the Zoning Code, as adopted, for delivery to the City, including a detailed index, for codification and publication, incorporating any changes to the screencheck ordinance identified by staff. The consultants will provide a camera-ready copy of the adopted Zoning Code, and CD-ROM copies in any word processing software preferred by the City and in a format acceptable to Book Publishing Company. All graphics produced by the consultants will be provided in both reproducible hard copy form and in electronic form, in any graphic software format preferred by the City and Book Publishing (.GIF, .TIF, .JPG, .BMP, etc).

PRODUCTS: Final Zoning Code, one camera-ready copy and CD-ROM in word processing format desired by the City staff.

Task 4 - Municipal Code Draft

Subtasks:

- 4.1 Administrative draft Code.** The consultants will prepare an administrative draft of the components of the Municipal Code other than the Zoning Ordinance. The administrative draft will be sent to the City for review, after which the consultants and staff will meet to discuss desired changes, and direction for preparing the administrative provisions.

PRODUCTS: Administrative draft Municipal Code — One reproducible original.

- 4.2 Preliminary draft.** This task will include: revisions to the contents of the administrative draft segments based on previous staff input; preparation of the remaining parts of the draft regulations, including a detailed table of contents; the inclusion of all the graphics and illustrations. We will forward the draft to staff for review and comment. We will meet with staff to review their comments and desired changes.

PRODUCTS: Preliminary Draft—reproducible original.

- 4.3 **Screencheck draft.** A Screencheck Draft will be prepared and provided to the City to verify that all requested changes to the Preliminary Draft have been properly completed, and that all final graphics are acceptable.

PRODUCTS: Screencheck Draft— one copy.

- 4.4 **Public review draft regulations.** A public review draft will be prepared and provided to the City for public review and hearings.

PRODUCTS: Public Review Draft — reproducible originals.

Task 5 - Public Review and Adoption

Tasks:

- 5.1 **Public hearings.** The consultants will attend up to two public hearings to review the draft documents.

- 5.2 **Screencheck final regulations.** After adoption of the updated Municipal Code and before its effective date, the consultants will prepare a final version, incorporating any changes made by the City Council. The consultants will provide screencheck version so that the City can verify that the document accurately incorporates all changes approved by the Council during the adoption process.

PRODUCTS: Screencheck Final Code — one copy.

- 5.3 **Final regulations.** The consultants will prepare a final version of the Municipal Code, as adopted, for delivery to the City, including a detailed index, for codification and publication, incorporating any changes to the screencheck ordinance identified by staff. The consultants will provide a camera-ready copy of the adopted Code, and CD-ROM copies in any word processing software preferred by the City and in a format acceptable to Book Publishing Company. All graphics produced by the consultants will be provided in both reproducible hard copy form and in electronic form, in any graphic software format preferred by the City and Book Publishing (.GIF, .TIF, .JPG, .BMP, etc).

PRODUCTS: Final Municipal Code, one camera-ready copy and CD-ROM in word processing format desired by the City staff.

C. Project Timetable

Based on the above scope of work, we propose to complete the preliminary draft of the Zoning Code within approximately four months following receipt of the City's "Notice to Proceed." Our experience with other similar projects suggests that the critical path in meeting this schedule is the time required by City staff to review the individual draft segments in order to provide direction to the consultants for any desired changes. Adoption of the updated regulations and the preparation of final documents is then dependent upon the timely scheduling and completion of Planning Commission and City Council hearings, but could be completed within a total of six to nine months. The time schedule for the completion of the remainder of the Municipal Code revision will be determined through consultation with staff.

3. PROJECT BUDGET

Our proposed project budget includes all of the services and products described in Part 2 of this proposal (Work Plan). The total cost for completing the Zoning and Municipal Code revisions is \$66,130. The proposed fees are based on the following billing rates, which would also be used for any additional work performed on a time and materials basis:

Principals	\$ 100.00 per hour
Senior Associate	85.00
Associate	70.00
Software Engineer	70.00
Graphics Technician	50.00
Additional meetings	\$ 750.00 per day

A breakdown of the proposed fee by task is provided on the following pages. The "Materials and Services Costs" include all direct costs (e.g., internal copying, phone, postage/shipping, etc.). The consultants do not bill for travel time or costs.

Paso Robles Zoning and Municipal Codes Revision Proposed Budget/Project Fee

LABOR COSTS						
TASKS	Staff Time (hours)				Total Hours	Task Cost
	Principal	Associate	CAD/ Drafting/ Graphics	Software Engineer		

Phase 1 - Zoning Code Revision

1. Information Collection and Scope Refinement

1.1 Initial staff meetings	4	4			8	\$680
1.2 Document review	8	16			24	\$1,920
1.3 Working outline, format, style sheets	2	4			6	\$480

2. Zoning Code Preparation

2.1 Zoning district provisions	24	32			56	\$4,640
2.2 Administrative provisions	16	8			24	\$2,160
2.3 General regulations	32	32			64	\$5,440
2.4 Preliminary draft Zoning Code	8	24	32		64	\$4,080
2.5 Screencheck draft Code	8	16	16		40	\$2,720
2.6 Public review draft Code	4	16	4		24	\$1,720

3. Public Review and Adoption

3.1 Public hearings - 2	4				4	\$400
3.2 Screencheck Final Zoning Code	16	24	16		56	\$4,080
3.3 Final Code, including CD-ROM	4	24	4	16	48	\$3,400

Phase 1 Cost \$31,720

Phase 2 - Municipal Code Revision

4. Municipal Code Draft

4.1 Administrative draft Code	80	120			200	\$16,400
4.2 Preliminary draft Code	16	32	32		80	\$5,440
4.3 Screencheck draft Code	8	16	16		40	\$2,720
4.4 Public review draft Code	4	16	4		24	\$1,720

5. Public Review and Adoption

5.1 Public hearings - 2	4				4	\$400
5.2 Screencheck Final Code	16	24	16		56	\$4,080
5.3 Final Code, including CD-ROM	4	24	4	16	48	\$3,400

Phase 2 Cost \$34,160

Total hours	262	432	144	32	870
Rate	\$100	\$70	\$50	\$70	

Total Labor	\$65,880
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MATERIALS & SERVICES COSTS		
Copying/reproduction	\$100	
Shipping & postage	\$0	
Travel (lodging, meals, mileage)	\$0	
Supplies	\$100	
Total Materials & Services		\$200
TOTAL ESTIMATED COST		\$66,080

4. SELECTED REFERENCES

Our team members have worked on over 50 development ordinance projects. We encourage the City to contact our past and current clients regarding our ability to complete identified projects and tasks in a timely manner, with a high level of quality and accuracy, and within the approved budget constraints. We have never required a budget adjustment for a development ordinance project; unless additional work products, clearly beyond the scope of the original work plan, were requested by the client. The following are relevant examples of our work.

City of Novato Zoning Ordinance - Crawford Multari Clark & Mohr, Jacobson & Wack, and Urban Design Studio are preparing a comprehensive update of the Novato Zoning Ordinance, which follows the adoption of the City's new General Plan. Paul Crawford is project manager. The update is focusing on usability, and the integration of new regulations on sensitive habitat and other sensitive environmental and scenic resources, in compliance with the environmental regulations of the San Francisco Bay Conservation and Development Commission (BCDC). Work began on this project in April, 1998, and a complete administrative draft ordinance was delivered to the City for staff review on June 30, 1998.

Contact: Alan Lazure, Principal Planner
415-897-4306

City of Calabasas Development Code - Paul Crawford prepared this City's first Development Code including zoning, subdivision, and grading ordinances, together with regulations for erosion and sedimentation control consistent with NPDES requirements. Code preparation occurred concurrently with the adoption process for the City's new General Plan, and addressed issues of hillside development in addition to common zoning and subdivision topics. The new code was adopted by the City in July, 1998.

Contact: Marilyn Miller, AICP, Acting Director of Community Development
City of Calabasas (now with the City of Oxnard)
805-385-8207

City of Chico Development Code (CMCM, J&W, UDS) - Working with Urban Design Studio (UDS), Crawford and Jacobson are preparing comprehensive revisions to the City's Zoning and Subdivision Ordinances following the adoption of a new General Plan, and the integration into the Development Code of new community design guidelines. Besides implementing new General Plan policies involving compact urban form and other community design issues, the update emphasizes logical organization and ease of use, as well as streamlining the development review process.

Contact: Pam Figge, Senior Planner
City of Chico
916-895-4851

Marin County Development Code (CMCM, J&W) - Revising the County's zoning and subdivision ordinances into a comprehensive Development Code, including regulations for development within the Coastal Zone. Issues addressed range from standards for high quality urban development, to agricultural land preservation, to development within

environmentally sensitive areas subject to the different requirements of the California Coastal Commission and the San Francisco Bay Conservation and Development Commission (BCDC).

Contact: **Alex Hinds, AICP, Community Development Director**
Marin County Community Development Agency
415-499-7880

Placer County Zoning Ordinance (CMCM) - Paul Crawford completed a reorganization and reformatting of the County's outdated Zoning Ordinance, including consolidation and redefinition of existing zoning districts, and the retention of some existing requirements and standards, all with extensive rewriting to improve clarity and understanding. The ordinance deals with land use and development in unincorporated urban communities and rural areas from the San Joaquin Valley floor to the Sierra around Lake Tahoe. The standards dealt with a range of issues from senior citizen housing projects within urban areas, to high-tech business parks, to ski resort facilities.

Contact: **Fred Yeager, Planning Director**
Placer County Planning Department
916-889-7470

City of San Bernardino Development Code (J&W, UDS) - Prepared comprehensive Development Code, incorporating zoning, subdivision, and City-wide design guidelines into an integrated, easy-to-use document. Hillside development and ridgeline protection were among the many issues addressed. The project received the National APA Outstanding Planning Award for Plan Implementation in 1992.

Contact: **Valerie Ross, Principal Planner**
City of San Bernardino
909-384-5057

Town of Truckee Development Code (CMCM, J&W, UDS) - Preparing this High Sierra Town's first zoning and subdivision regulations, and design guidelines after its incorporation. The draft Code is currently being reviewed by the Planning Commission.

Contact: **Tony Lashbrook, Community Development Director**
Town of Truckee
916-582-7876

APPENDIX A

Principles of Effective Development Ordinances

Through our careers in administering, drafting and teaching about development codes, and zoning and subdivision regulations, we have identified several important aspects to be considered in the process of preparing a new code or ordinance, or updating an existing zoning document. Besides the fundamental goals of effectively implementing the General Plan, satisfying State mandates and efficiently guiding day-to-day development decisions, any new or revised code/ordinance should also focus on document usability. It is important that zoning information be readily accessible and understandable to all users, staff as well as the public. Among the format and content features that zoning documents should include to enable ease of use by all parties are the following:

- **Logical organization** - The table of contents and the internal structure of chapters should be organized to reflect the sequence in which ordinance users most commonly need to find specific information. For example, the fact that many existing ordinances place their "Definitions" at the beginning of the document would appear to suggest that users will routinely read the definitions before any other portion of the ordinance, which in fact rarely occurs.

While keeping the definitions at the front of a zoning ordinance makes sense if maintaining the same format in all segments of a municipal code is considered important, a primary question to ask in deciding how to organize a zoning or subdivision ordinance is "Where will users most intuitively expect to find specific information?" People working with zoning documents tend to be first interested in finding whether particular land uses are allowed in particular zones and what permits are required, then what regulations apply to the design and development of a use and, finally, what specific procedures must be followed to gain project approval. A particularly effective and efficient means of ordinance organization is to reflect these procedural sequences and the order in which decisions about the applicability of provisions must be made.

- **Clear language and readability** - Zoning documents must be clearly written, avoiding ambiguity, jargon and lengthy narrative, and use the simplest terms possible to describe their requirements. Regulations should be consolidated into easy-to-understand tables whenever possible, accompanied by graphics where the illustration of how a standard applies to property can improve clarity and understanding. Overall, the format should employ effective graphic design and page layout techniques to enhance readability.
- **Informative chapter and section titles** - A user should be able to readily determine the areas of the ordinance that will affect their interests by reviewing the table of contents. Chapter and section titles should be descriptive, as in "Standards for Specific Land Uses" rather than an ambiguous "General Provisions."
- **Cross-references** - While reviewing regulations on a particular topic, ordinance users must be made aware of other related regulations that may affect their interests. A zoning document should include cross-references to its other relevant provisions, as well as references to potentially-applicable regulations (e.g., building, environmental, grading, subdivision, etc.) in other municipal code documents, where appropriate.

- **Extensive use of graphics** - An ordinance should use graphics to assist in illustrating the applicability and/or effect of regulations wherever illustration can improve understanding.
- **Formal procedure for interpretations** - The administration of zoning documents inevitably involves the need for interpreting their provisions, where the applicability or effect of a particular requirement may become uncertain because of a situation that was not anticipated when the ordinance was drafted. These situations often include new land uses that did not exist when the ordinance was prepared (e.g., video game arcades in the case of ordinances drafted in the 1960s). A zoning document must clearly define the authority for interpretations, include a formal procedure for all types, and provide a definitive means for incorporating them into the ordinance through amendment, or otherwise ensuring that they will be effectively recorded for future retrieval and use.
- **Simplified permitting procedures** - An ordinance should employ the least complicated permitting procedures possible, consistent with State law requirements and the need to ensure effective project review and proper implementation of the General Plan. Discretionary permits may not be necessary if clear development or performance standards can effectively address all community concerns about a particular land use through a ministerial permit process.
- **Organization to accommodate changes** - Ordinance chapters and sections should be organized and numbered to accommodate amendments without the need for extensive renumbering of existing sections. The initial drafting of the ordinance should anticipate the need for additional regulatory topics in the future, and provide space in the numbering system for their later inclusion.

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