

TO: JAMES L. APP, CITY MANAGER

FROM: BOB LATA, COMMUNITY DEVELOPMENT DIRECTOR

SUBJECT: GENERAL PLAN IMPLEMENTATION: PURPLE BELT
ACTION PLAN

DATE: FEBRUARY 15, 2005

Needs: For the City Council to consider selection of a contract services team to prepare a Purple Belt Action Program.

Facts:

1. The 2003 General Plan update includes policy and a series of action items calling for implementation of the Purple Belt program. (Attached is a summary of excerpts from the General Plan).
2. A Purple Belt is intended to buffer the eventual edge of the City through the preservation and encouragement of agriculture and open space.
3. The City issued a Request for Proposals (RFP) to seek assistance from qualified consultants to formulate a Purple Belt Action Plan. (Attached is a copy of the RFP).
4. Two qualified consultant teams responded to the RFP:
 - Economic & Planning Systems / Design, Community & Environment / Sage Associates
 - Bay Area Economics / RRM Design Group / Sustainable Agriculture Education
5. The two proposals were reviewed and oral interviews conducted by:
 - A City Council ad hoc Committee (Council members Picanco and Strong);
 - Lynda Auchinachie, County Department of Agriculture
 - Mike Wulkan, County Department of Planning and Building
 - Susan Zaleschuk and Bob Lata, City of Paso Robles

6. The consensus of the panel is that the team consisting of Economic & Planning Systems / Design, Community & Environment / Sage Associates is the best qualified to prepare the Purple Belt Action Plan. (Attached is a copy of the Proposed Scope of Work).
7. Funds set aside for preparing and implementing the General Plan provide adequate resources to pay for preparation of the Purple Belt Action Plan.

Analysis
and

Conclusion:

Both of the firms submitting proposals to prepare the Purple Belt Action Plan offer excellent qualifications, a viable scope of work, and comparable cost and work schedules. Both teams have extensive experience.

Based on both the written proposals and the interviews, and consideration of work samples provided, the consensus of the panel was that the team consisting of Economic & Planning Systems / Design, Community & Environment / Sage Associates seems a better fit in terms of their scope of work and team composition.

The proposal from Economic & Planning Systems / Design, Community & Environment / Sage Associates presents a scope of work estimated to cost \$105,000, plus a recommendation to undertake up to two additional stakeholder meetings. Their work program is in adequate detail to support this cost estimate.

For the purposes of a program budget, it is recommended that \$120,000 be appropriated from the General Plan implementation funds that were carried over from the prior budget year.

Providing a budget of \$120,000 would pay for publication of draft and final documents, mailings, and related City expenses, plus the two additional stakeholder meetings. Any funds that remain unexpended would be returned to the General Plan implementation carry over account.

Policy

Reference:

General Plan policies regarding establishment of the Purple Belt

Fiscal

Impact:

None; adequate funds have been carried over from the General Plan program for the purposes of implementing Council policies that were adopted as a part of the 2003 General Plan update.

However, it is desirable to track expenses to develop the Purple Belt Action Plan separately from the costs to update the General Plan. Accordingly, it is requested that \$120,000 of the carry-over appropriation for the preparation of the General Plan update, project #100-910-5224-596, be transferred to project #100-910-5224-771.

Options:

- a. That the City Council select the team consisting of Economic & Planning Systems / Design, Community & Environment / Sage Associates to work with the City to carry out preparation of the Purple Belt Action Plan; authorize the City Manager to enter into an agreement to have the work done in a manner substantially consistent with the proposal dated December 2004, with a total program budget of \$120,000; and adopt Resolution No. 05-xx authorizing transfer of the necessary resources from the funds carried over to implement the adopted General Plan.
- b. Amend, modify or reject the foregoing option.

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Excerpt from December 16, 2003 General Plan (Land Use Element)

City of Paso Robles

POLICY LU- 2E: “Purple Belt” (Open Space/Conservation Areas Around the City). Create a distinct “Purple Belt” surrounding the City by taking actions to retain the rural, open space, and agricultural areas.

Action Item 1. Coordinate with the County and private organizations to identify boundaries of and obtain support for a “purple-belt” that buffers the eventual edge of the City through the preservation of existing, and encouragement of future agriculture and open space.

Action Item 2. As feasible, acquire development rights/easements within the designated purple belt area. Use these development rights/easements to limit land uses within the designated purple belt to agricultural and/or open space.

Action Item 3. Take steps to ensure that the County retains surrounding lands in very low-density rural residential, open space (including natural resource), and agricultural uses. Oppose the creation of new parcels within the County.

Action Item 4. Implement strategies that help preserve or protect agriculture beyond the City limits, including:

- Establishment of agricultural buffer easements, berms and/or vegetative screening, on property proposed for urban development as a condition of approval of discretionary development applications.
- Implement the City’s adopted “right-to-farm” ordinance.
- Participation in the Williamson Act and other farmland preservation programs.

Action Item 5. Require disclosure agreements for new non-agricultural development within 500 feet of an existing agricultural use. Such disclosure agreements should describe potential nuisances (e.g., dust, noise, pesticide spraying, etc.) associated with normal agricultural operations.

REQUEST FOR PROPOSALS
ANALYSIS OF OPTIONS AND ACTION PLAN / PROGRAM FOR
OPEN SPACE PRESERVATION ; CITY OF PASO ROBLES

INTRODUCTION:

The City of El Paso de Robles is requesting proposals from qualified consultant firms to prepare an analysis of options and an action plan / program to acquire open space interests regarding properties beyond the City's corporate boundaries. The need for the plan / program is based on the "purple belt" policy contained in the City's December 2003 General Plan. The concept of the "purple belt" relates to the Paso Robles wine grape growing region that surrounds the City.

Relevant expertise and experience in the fields of land use planning, real estate law and finance are required. The respondent may assemble a consultant team under one primary consultant.

The City is committed to the timely preparation and completion of this study. The consultant will be responsible for all supplementary data collection and analysis. The City's intent is to have a study prepared that is concise and, at the same time, adequately comprehensive.

BACKGROUND:

Attached is a copy of the purple belt policy from the City's General Plan. The City is seeking professional assistance to structure an action plan / program to implement this policy.

SCOPE OF WORK:

1. Analysis of options for boundaries for a purple belt;
2. Land use inventory of properties within the boundaries of a potential purple belt;
3. Recommend a priority list of properties that would be most suitable for the intended purpose;
4. Identification of options for preservation, including but not limited to acquisition of open space easement, acquisition in fee with a lease-back provision and/or other mechanism(s) to preserve agricultural uses;
5. Presentation of a realistic range of cost estimates for the open space preservation options;
6. Analysis of program management approaches and related costs;
7. Identification of potential public, non-profit and private financial resources / organizations that could assist the City in creating and / or managing the open space area;

8. Potential for linkage and shared funding of the City's open space goals with other program objectives such as preservation of kit fox habitat; and
9. Preparation of a comprehensive action plan / program, including legal / procedural framework and strategic policy options for implementing the General Plan policy. The action plan needs to include but not be limited to long-term program management responsibilities and realistic cost estimates for all program components.

RELATED INFORMATION:

1. Resources available: 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.
2. Work Schedule: Completion of the work program is desired by June 30, 2005.
3. Meetings: In addition to a kick-off meeting with City staff, the consultant should anticipate making three (3) informal presentations to City staff and a City Council ad hoc Committee, one (1) public workshop for property owners, and two (2) formal presentations (one each to the City's Planning Commission and City Council). The project budget needs to reflect separate costs for each type of meeting so that the City and consultant can add or delete meetings / make schedule adjustments as needed.
4. Public Notices: The City will mail and arrange for newspaper publishing of all required hearings and mailing of public notices. The consultant will be responsible for identifying and maintaining a mailing list of property owners, agencies, and interested persons. City will be responsible for duplicating and mailing all draft and final documents to persons on the mailing list.
5. Additional Available Information: The following items will be available to the consultant that is chosen to prepare the study:
 - a. The City's 2003 General Plan
 - b. The EIR prepared in conjunction with the 2003 General Plan
 - c. Digitized City Base Map (AutoCAD format)
 - d. Whatever aerial photography the city has on file
6. 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. Weekly verbal status reports, starting one week after execution of the approved contract.
- b. A Preliminary Draft report to be submitted to the Community Development Director within a specified number of days after execution of the approved contract.
- c. A Revised Draft report to be submitted for public review and comment within a specified number of days after execution of the contract.
- d. A Final report reflecting response to comments to be submitted to the Community Development Director within a specified number of days after execution of the contract.

All reports will be submitted 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. All documents shall be clear and terse. Maps and diagrams shall be professionally prepared originals or clean copies, and are subject to City approval; unintelligible photocopies of existing maps or plans will not be acceptable. A camera-ready original will be required to be submitted to the City upon approval of the final action plan.

The City will require that the text of the Draft and Final reports, including all maps and diagrams in reproducible form, be provided on compact disk to the City in Microsoft Word for Windows and Auto CAD, prior to respective payments. The consultant is responsible for submitting 3 copies of the Preliminary Draft in three ring binder form, and 1 single sided master copy of the Draft and Final reports.

BUDGET:

The consultant shall submit a fixed budget amount to cover all the foregoing services for preparation of the study. The budget will show a separate break-out of costs for components called for in the scope of work, administration costs, consultant time and expenses for attendance at meetings, public hearings, etc., in the form of 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 implement the General Plan policy.

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.
- 30% of the contract fee will be paid upon submittal of an acceptable Draft for public review and comment.
- 20% of the contract fee will be paid upon approval of the Final Action Plan by the City Council including all responses to comments, and the required papers, maps / plans, and all work on CD 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 study.
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;

- c. Identification and qualifications of any subcontracting consultants, including resumes or qualifications of individuals or the firm as applicable;
 - d. Copies of two (2) examples of studies 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.
 - e. Demonstration of expertise in the fields needed to pursue this line of study.
3. A budget to include the following:
- a. A firm cost to complete the described work, 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;
 - c. A realistic time-line for preparation of an EIR of the type being proposed (an alternative schedule may be proposed, but timely completion is important).
4. Identification of any errors and omissions insurance coverage the firm may have.
5. Any and all exceptions from the scope of work description or preliminary specifications 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 EIR within two weeks after executing the contract, and providing the following specific information:
- Date for submitting Preliminary / Administrative Draft
 - Date for submitting the Public Draft of the study (based on when the City responds with comments on the Preliminary / Administrative Draft)
 - Date for submitting the Final report (based on when the City provides the consultant with comments on the Public Draft of the study)

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, December 3, 2004. 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 "Purple Belt Action Plan". 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; an oral interview may be required; the date for any interview will be subject to mutual agreement.
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) 237-3904, or e-mail: bob@prcity.com] should you have questions or need further information regarding the RFP.

Attachments / Enclosures:

1. General Plan excerpt regarding the “purple belt”;
2. Standard City / Consultant Contract

<p style="text-align: center;">Granting of this contract may require disclosure of personal financial interests under the Political Reform Act</p>



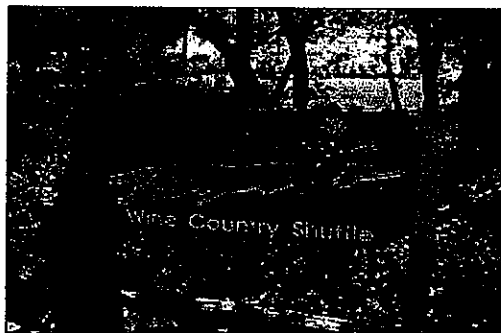
Economic &
Planning Systems

*Public Finance
Real Estate Economics
Regional Economics
Land Use Policy*



PROPOSAL

EL PASO DE ROBLES PURPLE BELT ACTION PLAN



Prepared for:

City of El Paso de Robles

Prepared by:

Economic & Planning Systems, Inc.

In Association with:

Design, Community & Environment
Sage Associates

December 2004

EPS #14151

Exhibit "A"



BERKELEY

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Berkeley, CA 94710-2515
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SACRAMENTO

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DENVER

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II. PRELIMINARY SCOPE OF WORK, BUDGET, AND SCHEDULE

The following is a preliminary proposal for the El Paso de Robles Purple Belt Action Plan. This scope, budget, and schedule represent a starting point for discussion with the City on the specific activities and flow of work for the project and are based on the information in the RFP and our team's experience with developing open space programs for similar jurisdictions in California. We would be happy to modify the scope and budget to meet the budgetary and project needs of the City.

SCOPE OF WORK

TASK 1. PROJECT INITIATION

The consultant team will meet with City staff to further define the goals of the project, discuss the scope and schedule, and refine the workplan as necessary. The consultant team will tour the area with City staff, identify the planned edge of the City, and discuss potential boundaries for the Purple Belt area. In addition, the consultant team will collect all documents and data the City has, define the Purple Belt Study Area and develop a preliminary list of key stakeholders.

Work Product/ Outcomes: Finalized Work Scope and Preliminary Stakeholder List

TASK 2. DEFINE EXISTING CONDITIONS

Task 2.1: Develop Land Use Maps

The consultant team will develop a series of GIS maps that will provide important land use information on the Purple Belt Study Area. The GIS maps will be developed by Design, Community & Environment (DC&E) based on the Digitized City Base Map that is currently in AutoCAD. As needed, the maps will show information on jurisdictional boundaries, parcel ownership patterns, existing uses, existing conserved areas, agricultural areas by soil and State classification type, current zoning, remaining homesite entitlements, land under Williamson Act contracts, and environmental constraints (such as wetlands, habitats of threatened or endangered species, steep slopes, etc.), as available. In addition, the team will create an opportunities and constraints map that identifies key opportunities for open space conservation and any constraints to creating a cohesive Purple Belt (such as existing development entitlements). Maps will be created from existing information provided by the City or other entities.

Task 2.2: Review Policy Documents

The consultant team will review pertinent City and County policy documents relating to land development, agricultural activities, open space and agricultural preservation, and conflicts between development and agriculture. This document review will complement the feedback from the stakeholders on issues, concerns, and the regulatory environment. Policies supportive of agriculture and policies detrimental to agriculture will be noted for reference in devising updated policy language in support of the planning effort. This task is particularly important since the preservation of open space must work in conjunction with City and County policies that direct growth to specific areas, such as the Downtown and other infill locations.

Task 2.3: Estimate Current Land Values

Land values are generally defined by two key components, the value of their development rights and the value of their agricultural rights. Development rights will depend on the demand for the types of development that can occur on the site or that are speculatively considered to potentially occur on the site. Agricultural rights will depend on the investment in agricultural improvements, the quality of the soil and climate, and the strengths of different agricultural markets. The consultant team will estimate current, average fee title land values and their constituent development and agricultural components. Land value estimates will be developed for up to three different types of land.

Work Product: Background Report (Part 1)

TASK 3: POTENTIAL IMPLEMENTING MECHANISMS, FUNDING SOURCES, AND IMPLEMENTING ENTITIES

Task 3.1: Implementing Mechanisms

As part of this task, the consultant team will provide a description of the range of implementing mechanisms available for permanent and temporary greenbelt conservation—including easement acquisitions, fee title acquisitions and leasebacks, conservation partnerships, Williamson Act, transfer of development rights, and developer mitigations. Each mechanism will be described, along with its advantages and disadvantages, and a brief description of where it has been used successfully in the past.

Task 3.2: Funding Options

One of the defining features of the different implementing mechanisms will be their reliance on different levels of funding. Some mechanisms, such as transfer of development rights or clustering programs, will rely on exchange of development locations and values and require minimal additional funding. Others, such as the acquisition of fee title to land, primarily rely on the availability of funding. The consultant team will outline the full range of funding mechanisms that could support

the plan, including State and federal grants available, development-based mitigation options, and tax-based options. The advantages and disadvantages of each mechanism will be described along with examples of where they have been used successfully before. Potential levels of funding from each source will also be provided, recognizing that the development of the plan itself will increase opportunities for funding.

Task 3.3: Implementing Entities and Cost

Plan implementation will need to be the responsibility of an entity with sufficient staff and funding for the range of operations required. The consultant team will describe the likely activities and roles of the entity and the potential cost of operations. Different potential entities will be described, including the City, existing conservation organizations, a new Joint Powers Authority, and a new land trust, among others along with their advantages and disadvantages and places where they are currently operating.

Work Product: Background Report (Part 2)

TASK 4. OUTREACH TO KEY STAKEHOLDERS

Building consensus among the various stakeholders in the El Paso de Robles area will be a key to creating a successful and long term action plan for open space preservation. Based on our previous experience, the consultant team believes that outreach to key stakeholders should occur early in the process and that communication with interested parties should occur throughout the process.

Task 4.1: Identification of Key Stakeholders

The consultant team will work with City staff to develop a list of key stakeholders, including the City, the County, LAFCo, El Paso de Robles Vintners and Growers Association, the El Paso de Robles Chamber of Commerce, vineyards, ranchers, other relevant farming and ranching groups, local developers, major property owners, land trusts and conservation organizations active in the area.

Task 4.2: Meetings with County and LAFCo

The EPS team will meet with representatives of the County and LAFCo to identify common goals and issues and to build support for the implementation of the Purple Belt plan. This meeting will further define goals, but also clarify the regulatory framework within which the plan will be implemented.

Task 4.3 (Optional): Stakeholder Meetings

As an optional task, the EPS team will meet with up to four key stakeholder groups to build support for the open space program. The exact stakeholder groups for these meetings should be decided on in consultation with City staff. These meetings should

occur prior to the Stakeholder Workshop (Task 4.4) and will be held on a single day to reduce travel costs for the consultant team. The costs of these meeting are not included in the team's budget.

Task 4.4: Stakeholder Workshop

Early in the process, DC&E, with assistance from Sage Associates will hold a stakeholder workshop to receive feedback on the concerns, experiences, and interests of key stakeholder groups. At this workshop, the EPS team will educate the stakeholders about the benefits of and barriers to creating open space preservation programs, work with the group to identify preliminary locations for the Purple Belt and uncover any issues that individual landowners or groups of landowners may have.

Work Product: Memorandum describing key stakeholder perspectives

TASK 5. PLAN ALTERNATIVES

Task 5.1: Develop Purple Belt Alternatives

The consultant team will develop up to three alternative scenarios for the plan, with each alternative differing in some combination of the proposed boundaries of the Purple Belt area, key acquisition criteria, primary implementing mechanisms, key funding sources, suggested implementing entity, and supportive regulatory decisions and additional policies. These alternatives will be used in discussions with City staff, the City Council and the Planning Commission to select a preferred Action Plan for the El Paso de Robles Purple Belt.

Task 5.2: City Staff/Ad Hoc Committee Meeting

Once the alternatives are developed, the consultant team will meet with the City staff to discuss the alternatives and select a preferred direction for the Purple Belt Action Plan. Based on our experience, it is likely that the preferred alternative will be a combination of various elements from the three alternatives. Following feedback from the City Staff/Ad Hoc Committee Meeting, the consultant team will devise a preferred alternative for presentation to the City Council and Planning Commission.

Task 5.3 (Optional): Public Workshops/Stakeholder Meetings

As an optional task, the consultant team could present and discuss the Action Plan alternatives at a large public workshop or in individual meetings with key stakeholder groups. This outreach effort could help to build additional support for the plan because stakeholder and the public would have a say in determining the direction of the Action Plan. The costs of this optional task are not included in the team's budget.

Task 5.4: Create Preferred Alternative

Based on the results of the meeting with the City staff and/or Advisory Group, the EPS team will refine the preferred alternative for presentation to the City Council and Planning Commission.

Task 5.5: Joint City Council/Planning Commission Workshop

This preferred alternative will then be presented to a joint meeting of the City Council/Planning Commission for their feedback. Based on the input received, the EPS team will develop a preliminary draft of the Purple Belt Action Plan in Task 6.

Work Product: Maps, Narrative, and Tables describing Plan Alternatives and Preferred Alternative

TASK 6. PURPLE BELT ACTION PLAN

Based on feedback provided in Task 5, the consultant team will prepare the preliminary draft Purple Belt Action Plan.

Task 6.1: Draft Purple Belt Action Plan

The Purple Belt Action Plan will include a number of components:

- Summary of background information on the regulatory, geographic, and economic context
- Boundaries of Purple Belt area
- Criteria for selecting properties for future acquisition
- Proposed implementing entity and conservation partners
- Policies to enhance the purple belt, including policies supporting agricultural uses, addressing development-agricultural conflicts, and strengthening the purple belt concept
- Connections to other City and regional policies, and mutual benefits
- Cost estimates for land acquisitions, on-going program costs, and other potential costs, including endowments
- Implementing mechanisms and funding plan, including methods for securing funding to cover land acquisitions and other costs, as well as other selected mechanisms for preserving land, including developer donations and transfers of development rights
- Funding scenarios, including the potential rate of land acquisition given costs and estimated funding
- Timetable of actions required to implement plan

An Administrative Draft of the Action Plan will be presented to City staff for review and comment. Based on the written comments received from City staff, the EPS team will develop the Draft Purple Belt Action Plan for public review and comment.

Task 6.2: Public Workshop

The EPS team will present the Draft Purple Belt Action Plan at a public workshop for feedback and comment.

Task 6.3: Planning Commission and City Council Meetings

Following the public workshop, the consultant team will prepare and conduct formal, separate presentations to the Planning Commission and the City Council for comments on the Draft Purple Belt Action Plan. The consultant team will prepare a PowerPoint presentation for these meetings that will describe the plan and discuss the comments received at the public workshops.

Task 6.4: Final Action Plan

Based on the comments received from the public Planning Commission and City Council and direction from Staff, the EPS team will revise and finalize the Purple Belt Action Plan for distribution by City staff.

Work Products: Administrative Draft Action Plan, Draft Action Plan, Final Action Plan; PowerPoint presentation on Draft Action Plan

TASK 7: MEETINGS, PRESENTATIONS, AND STATUS REPORTS

The consultant team will attend ten meetings/ presentations on six different meeting days in support of the prior tasks. This includes the kick-off meeting with City staff, three meetings with the City Staff/ City Council Ad Hoc Committee, two public workshops, one meeting with County and LAFCo staff, one joint City Council/ Planning Commission workshop, one Planning Commission meeting, and one City Council meeting. As described above, the proposal also includes two optional public workshop/ stakeholder meetings that have not been included in the budget. To the extent possible, City Staff/ Ad Hoc Committee team meetings should occur on the same day as other meetings to reduce travel costs. In addition, selected members of the consultant team will provide 20 verbal status reports over the course of the project, each assumed to last one-half hour.

BUDGET

The preliminary budget estimate for this project by major task and staff person is provided in Table 1. We estimate that the consultant team can complete the above Scope of Work for a not-to-exceed budget amount of \$104,960. The budget estimate covers costs associated with the tasks, materials, and meetings described in the Scope. Additional tasks or meetings beyond those described herein will be charged on a time and materials basis based on a contract amendment developed prior to the initiation of work. Charges for consultant time are based on the amount of time actually spent.

SCHEDULE

Table 2 provides a preliminary schedule for the development of the Purple Belt Action Plan. The schedule shows approximate meeting dates and the timing of tasks and deliverables over a six month horizon. The schedule reflects a tight timeframe as requested in the RFP and is dependent on fast product review and flexible availability for meetings.

Table 1
Budget Estimate
El Paso de Robles Purple Belt Action Plan
Economic & Planning Systems, Inc.; #14151

Task/ Description	EPS Staff				DCE Staff			
	Kieser Principal	Rice-Evans VP	Lee Associate	Prod.Staff	Early Principal	Raimi Associate	Fisher Planner	Prod.Staff
Task 1: Project Initiation	2	4	4	0	2	2	4	0
Task 2: Existing Conditions	3	16	60	2	2	16	36	16
Task 3: Implementation and Funding Options	4	20	60	2	0	5	8	0
Task 4: Stakeholder Outreach	0	2	0	0	8	16	20	0
Task 5: Plan Alternatives	4	20	30	2	2	20	32	0
Task 6: Purple Belt Action Plan	8	32	60	8	8	24	32	8
Task 7: Meetings/ Presentations/ Status (1)	8	65	30	2	8	55	0	0
TOTAL HOURS	29	159	244	16	30	138	132	24
Billing Rates *	\$235	\$155	\$100	\$60	\$165	\$140	\$90	\$65
TOTAL PROJECT COSTS								

* Billing rates shown are applicable during 2004 and are subject to change annually.
 (1) Ten meetings/ presentations/ workshops assumed to occur on six different meeting days. Meeting costs vary depending on staff attendance, meeting length, and number of meetings. The cost of individual meeting attendance is based on estimated hours and the billing rates shown. Includes twenty verbal status reports each assumed to last one half-hour.

Table 1
Budget Estimate
El Paso de Robles Purple Belt Action Plan
Economic & Planning Systems, Inc.; #14151

Task/ Description	Sage Associates Sage Principal	Staff Cost Subtotal	Direct Costs	Grand Total
Task 1: Project Initiation	1	\$2,600	\$200	\$200
Task 2: Existing Conditions	8	\$17,275	200	216
Task 3: Implementation and Funding Options	1	\$11,720	200	200
Task 4: Stakeholder Outreach	8	\$6,790	200	200
Task 5: Plan Alternatives	4	\$13,730	200	200
Task 6: Purple Belt Action Plan	10	\$22,800	200	208
Task 7: Meetings/ Presentations/ Status (1)	25	\$27,595	1,250	1,250
TOTAL HOURS	57			
Billing Rates *	\$140			
TOTAL PROJECT COSTS		\$102,510	\$2,450	\$104,960

* Billing rates shown are applicable during 2004 and are subject to change annually.
 (1) Ten meetings/ presentations/ workshops assumed to occur on six different meeting days. Meeting costs vary depending on staff attendance, meeting length, and number of meetings. The cost of individual meeting attendance is based on estimated hours and the billing rates shown. Includes twenty verbal status reports each assumed to last one half-hour.

Table 2
Preliminary Schedule
El Paso de Robles Purple Belt Action Plan
Economic & Planning Systems, Inc.; #14151

Description	Jan. 1-15	Jan. 16-31	Feb. 1-15	Feb. 16-28	Mar. 1-15	Mar. 16-31	Apr. 1-15	Apr. 16-30	May, 1-15	May, 16-31	Jun. 1-15	Jun. 16-30
Task 1: Project Initiation	KO	Pr										
Task 2: Existing Conditions			Pr									
Task 3: Implementation Mechanisms / Funding Options			Pr	C								
Task 4: Stakeholder Outreach					Co	W	Pr					
Task 5: Plan Alternatives							Pr	C	CC	PC		
Task 6: Purple Belt Action Plan									AD	C	D	W
												F

KO=Kickoff Meeting
Pr= Product
C= City Staff/ Ad Hoc Committee Meeting
Co= County/ LAFCo Meeting
W= Public Workshop
PC= Planning Commission Meeting
CC= City Council Meeting
AD= Admin Draft Report
DR= Draft Report
FR= Final Report