



CITY OF NEWPORT BEACH

100 Civic Center Drive
Newport Beach, California 92660

949 644-3200

newportbeachca.gov/communitydevelopment

April 26, 2019

General Plan Update Steering Committee

Nancy Gardner, Chair

Jim Carlson

Catherine O'Hara

Ed Selich

Debbie Stevens

Larry Tucker

Paul Watkins

Mayor Diane Dixon, Ex Officio Member

RE: Responses received to Request for Proposals (RFP) No. 19-69
Community Engagement Related to a Future General Plan Update

Dear Chair Gardner and Steering Committee Members,

The RFP submittal deadline has expired and the City received a total of five (5) proposals. They responding individuals or firms are as follows:

- Angela DiPasquale
- FSB Core Strategies
- Kearns & West
- MBI Strategic Communications
- S. Groner Associates, Inc.

Staff will begin to review the proposals, but will not be able to complete any formal evaluation prior to the May 1 Committee meeting. At this meeting, we can discuss next steps and the process moving forward.

If you have any questions, please contact me at 949-644-3253 or by email at bzdeba@newportbeachca.gov.

Thank you and see you next week.

Sincerely,

Benjamin M. Zdeba,
Associate Planner

(This page left intentionally blank.)

CITY OF NEWPORT BEACH



REQUEST FOR PROPOSAL NO. 19-69 COMMUNITY ENGAGEMENT RELATED TO A FUTURE GENERAL PLAN UPDATE

RFP Due Date: *Friday, April 26, 2019, 11 a.m. (PDT)*

RFP Administrator: Anthony Nguyen, Purchasing Agent
949-644-3080
anguyen@newportbeachca.gov



20
19

GENERAL STEERING COMMITTEE ACTION PLAN

CITY OF NEWPORT BEACH

ANGELA DIPASQUALE

THE PROJECT
RFP 19-69

PROPOSED TO
Anthony Nguyen

PROPOSAL OUTLINE

Angela DiPasquale | 2019

DISCUSSION POINTS

Introduction

Our Purpose

Meet The Team

Work Experience

Portfolio

Proposal Attachments





PROPOSER BACKGROUND

SECTION A



CITY OF NEWPORT BEACH 2019-2020

GENERAL PLAN STEERING COMMITTEE UPDATE

CONTACT US



@newportbeachgov



@cityofnewportbeach



calendar & agendas

WHO WE ARE

Our City General Plan Update is set to be streamlined with the State's General Plan, which both benefits and affects every member of the Newport Beach community. Our improved Action Plan is broken down into three steps.

First, we developed an implementation strategy to make our community development our primary focus. Great cities are sculpted by great citizens and their ideas. Goals that can transform strategies into resolutions, and visions into resolutions.

Second, The General Steering Committee is seeking local community representation and participation from it's residents. This newly adopted "listen and learn" community dialogue will achieve more desired outcomes, improve local policies, and strengthen the bond between our local community and council board.

Last, we have updated and expanded our easy to use Community Engagement portal, with new online tools, accessible data, and resources for the community to create a platform to be heard, expand equality, promote interactive dialogue, and connect with each other through public support.

THE PROJECT

While continuing to support our local marine life and harbors, conserve the vitality of our blooming conservation lands, enjoy the quality of our community beaches, open parks and trails, and protect the the history and charm of Newport Beach. Summer after summer, our city will thrive from Newport Beach's booming economic tourism, which continues to support the city's general fund, as well as the vitality and quality of life of the entire community.

The General Plan and all elements greatly affect economic opportunity, development, and stability of the City. Decisions regarding land use and circulation have direct and indirect fiscal implications on our local economy, and development must steer with state law and integrate needed housing elements in order to remain successful.

The General Plan is developed to use two dimensional existing policies in a three dementional realm. The General Steering Committee must carefully consider the placement of each building, in relation to neighbors, public spaces while also honoring existing municipal building codes, zoning violations, and sound regulations. The goal is to provide affordable housing action programs, keep the community involved throughout the changes, and continue to embody the charm, design and overall tone into any new community development property or housing remodel.

PLAN TIMELINE

01

CONCEPT/
PLANNING &
OUTREACH

02

COMMUNITY
INVOLVEMENT/
COLLABORATION
WITH GENERAL
BOARD

03

COMMUNICATE
CONCERNS &
SUGGEST OPTIONS
TO COUNCIL

04

HAPPY
COMMUNITY &
DESIRED
OUTCOMES AND
RESOLUTIONS

What is The General Plan ?



[California (law) +
community's (future vision)
framework for: decision
making, management, city
growth, goals & policies for
community's future vision

Located in the heart of Newport Beach

MANDATED ELEMENTS

LAND USE
CIRCULATION
HOUSING
NATURAL RESOURCES
OPEN SPACE
NOISE
SAFETY



UNIQUE NEWPORT BEACH ELEMENTS

HARBOR & BAY
HISTORICAL RESOURCES
HUMAN RECOURCES
RECREATION
ARTS & CULTURE



BECAUSE ALL TRADITIONAL
FORMS NEED AN UPDATE

PURPOSE

A

Ensure there is sufficient public outreach and stakeholder input regarding the update to the General Plan

B

Provide guidance to City staff regarding the preparation of a Request for Proposal for services to update the General Plan

C

Make recommendations to City Council regarding the selection of a consultant to assist in the update of the General Plan

D

Provide guidance to City staff and the consultant through the "Listen and Learn" process

E

Make other recommendations to the City Council regarding the update of the General Plan, as necessary.

POLICIES ADOPTED:

CLICK FOR THE LATEST UPDATE!
RESOLUTION 2019-7
RESOLUTION 2019-20



Meet The Team

CITY OF
NEWPORT BEACH

GENERAL PLAN STEERING COMMITTEE 2019-2020



CITY OF
NEWPORT BEACH

GENERAL STEERING COMMITTEE

STAFF LIASONS



JIM CAMPBELL,
DEPUTY DIRECTOR
jcampbell@newportbeachca.gov



BEN ZDEBA,
ASSOCIATE PLANNER
bzdeba@newportbeachca.gov





CITY OF
NEWPORT BEACH

GENERAL PLAN STEERING COMMITTEE

COMMITTEE MEMBERS

COMMITTEE MEMBERS	EMAIL
Nancy Gardner, Chair	ngardner@newportbeachca.gov
James Carlson	jcarlson@newportbeachca.gov
Catherine O'Hara	cohara@newportbeachca.gov
Ed Selich	eselich@newportbeachca.gov
Debbie Stevens	dstevens@newportbeachca.gov
Larry Tucker	ltucker@newportbeachca.gov
Paul Watkins	pwatkins@newportbeachca.gov
Mayor Diane Dixon, Ex Officio Member	ddixon@newportbeachca.gov

ANGELA DIPASQUALE

Content Creator & Event Planner

(949) 887-0079
theadventuresofangela
@gmail.com

WORK EXPERIENCE

SECTION C



PROJECT TIMELINE

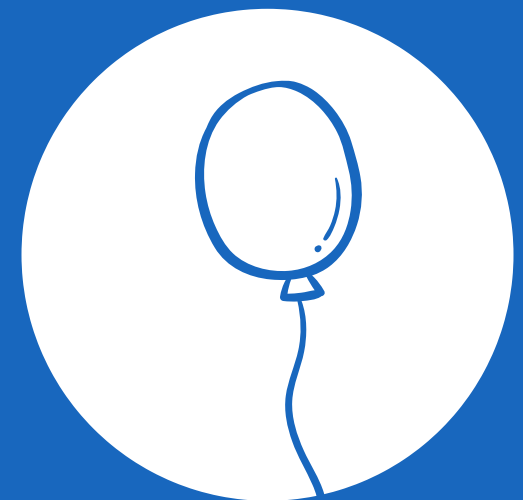


WINE MODERNE

Content Creator 2017-Present
Graphic Design, Merchandise
Creative Media Marketing



Junior Partner 2013-2018
Managed Newport Beach location,
Administrative Duties, Booked
Clients, 200 hour yoga teacher
certification, taught SUP Yoga



Event Planner 2011-2017
Orange Hill Special Events,
Mastro's Costa Mesa,
Charter Yachts of Newport Beach



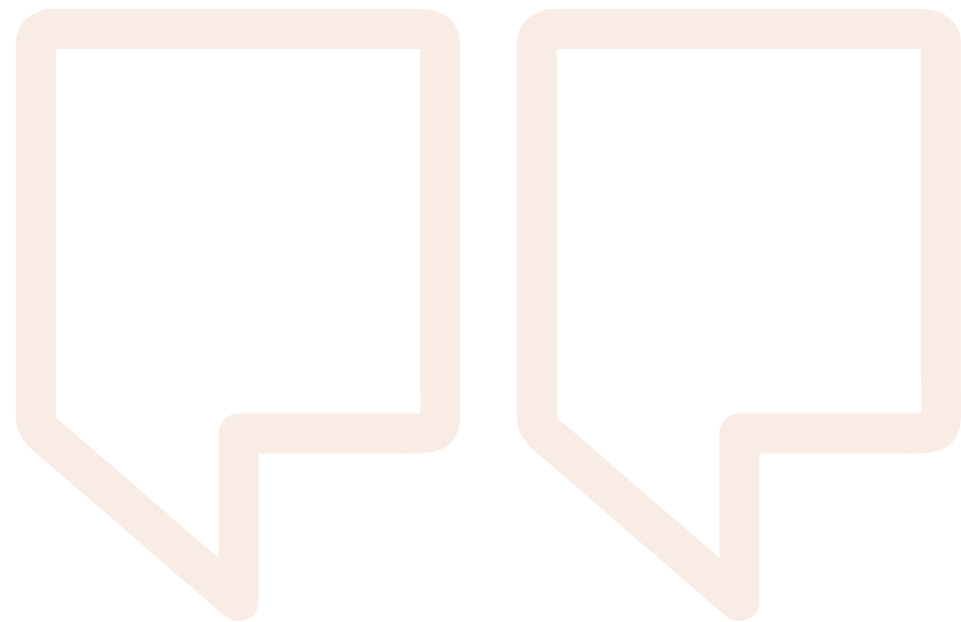
WINE MODERNE

SPRING PORTFOLIO

ADVERTISING STRATEGY

WINE MODERNÉ

SPRING/SUMMER MARKETING CAMPAIGN 2019



"TAKE TIME TO DEVELOP
BEYOND THE DRINKING
GLASS. WE PROMISE YOU
WILL NEVER GO THIRSTY"



**WORDS OF THE
LIFESTYLE**



**FEEL THE VIBE.
FREE YOUR MIND.**

"We celebrate the beauty in
ourselves and our
surroundings. We love to
create events that are high
in concept and make for a
fresh experience."

WINE
MODERNÉ

WHAT'S POPPIN?

SERVICE INTRODUCTION

Share our passion for fine food, wine, champagne and sake in unorthodox style and in a strangely delightful experience. We crave natural wine and only align with conscious, transparent wine producers that strive to provide earthy, funky, balanced and finessed varietals that always reflect and show a sense of place. Rocks, dirt and minerality are the essence of terroir. Our

wineries shine in this sub category of the Natural Wine Movement,. Wine Moderne mixes simple taste and seeks unity to find only the best killer juice. Nothing but the best will do.

Wine Moderne only provides products aligned with conscious wine producers, awarded and designated wine education, group travel excursions, team building activities, and tasting events.

We are a like minded group driven by the same goal to spread the world of wine.





NATURAL WINE



ORGANIC

Wine made from grapes grown in vineyards that exclude the use of synthetic chemicals, fertilizers, herbicides, fungicides, and pesticides.

BIODYNAMIC

For a vineyard to be considered biodynamic the vine-grower must follow the organic criteria plus some or all of the philosophies first voiced by Rudolf Steiner in 1924.

SUSTAINABLE

In general, organic and biodynamic philosophies concentrate on the vineyard (and similar standards of care should pass into the winery), but with natural winemakers stricter, self-imposed standards exist. For example, copper sulfate sprays and cultivated yeasts are never used in natural wine. The biggest misconception is about sulfur dioxide is that it has been used as a disinfectant and antioxidant since the Roman times.

50 SHADES OF GRAPE

Raw, amusing and deeply rooted. All 50 Shades Tasting Events will obsess, possess, and stay with you forever.

SOMM GUIDED TRAVEL

Treat yourself & embark on a vinous exploration of unique tours, extraordinary wine and travel experience.

GOLD STANDARD

The opportunity to guide you through a tasting that integrates mindfulness. The topics of balance, the power to transform, and guiding a harmonious life.

TEAM BUILDING

Groups are broken into different teams and are taught the process of wine blending guided by the winemaker. Each team is given time to make their own creation, and resulting wines are judged.



FRESH ON THE VINE



Get Go Ridesharing Company
Advertising Strategy



METHODOLOGY

SECTION B



Wine Moderne Social Media Strategy

SPRING 2019

Angela DiPasquale

Creative Content & Marketing

info@winemoderne.com

**WINE
MODERNE**

Executive Summary

Executive summary

- **SMART GOALS:** Specific, Measurable, Attainable, Relevant, Time Bound
 - Goals: Drive email sign-ups by 10% each month.
 - Grow Instagram Audience by 50 followers per week.
- **Create:** Instagram Profile and Email Campaign *prior* to launching.
- **Increase Brand Awareness:** Create Buzz and allows us to “see our ideal customer” - and find out what they want to see by creating an audience that leads our potential fans, followers, and customers (as real people’s wants and needs)
- **Social Strategy:** Utilize Social Listening Tactics and Scheduled Creative Content Postings, Partner with Micro-Influencers and Loyal Brand Advocates, #50shadesofgrape Instagram campaign, possible paid marketing campaigns, and conduct a true competitive analysis of the industry (the good and the bad) which will help set favorable targets and goals for the future.

Social Media Goals

Key performance indicators

By May 1st 2019, we will:

- | | |
|---|--|
| 1 | Grow Branded Instagram audience by 50 followers per week. |
| 2 | Drive email sign-ups 10% each month through buzz, promotion, and event exclusivity. |
| 3 | Have 10 created products for sale and available online for purchase. |
| 4 | Create a plan for the ongoing series of the brand, (Blog, Podcast & What's Lit Series) |

How goals align to business objectives

Business objective	Social media goal	Metric(s)
Grow the brand	Awareness <i>(these metrics illuminate your current and potential audience)</i>	Followers, shares, etc.
Turn customers into advocates	Engagement <i>(these metrics show how audiences are interacting with your content)</i>	Comments, likes, @mentions, etc.
Drive leads and sales	Conversions <i>(these metrics demonstrate the effectiveness of your social engagement)</i>	Website clicks, email signups, etc.
Improve customer retention	Consumer <i>(these metrics reflect how active customers think and feel about your brand)</i>	Testimonials, social media sentiment, etc.

Competitive Analysis

	Networks active	Number of followers	Strengths	Weaknesses	Content that resonates
Learn About Wine, WineLA @WINELA411	6: WineLA.com, Instagram, Youtube, Facebook, Pinterest, Twitter	10.4k Instagram Followers 547 Youtube Subscribers 4,153 Twitter Followers Previously hosted approx. 250,000-300,000 people at their events.	In Business for 23 years Affiliated and Partnered with 28 different winery organizations and their members. Strong industry presence in LA.	Instagram account lacks creative content and consumer engagement Heavy focus on video campaigns with unsuccessful presence and low user engagement (views)	In a competitive landscape, LearnAboutWine.com has established reputation. Wine LA is "New Energy & Next Chapter of the Brand, but lacks creative or focused marketing.
Viticole Wine Club @VITCOLEWINE	(5) ViticoleWine.com, Instagram, Twitter, Facebook, & Soundcloud	22.4k Instagram Followers, 1,067 Twitter Followers	In Business for 12 years, Wait List exclusivity, only way to join Organic Wine Club Successful use of Social Listening Tactics on Instagram with high user engagement. Creates Brand Personality via Vlog/video posts, which "connects" the	Overall success of the "brand" relies on the continuation of recurring member subscriptions, and the "exclusivity" may limit financial gain. Grungy, outdated website with several "Coming Soon" pages. Instagram lacks creative contrast, all	"Measured Growth Enabler" Creates Viticole Wine Club Waitlist, Collects payment, Negotiates quantities with wine collaborators and forecasts that shipment of product will arrive to member in 1-2 years.

STRENGTHS

[What are your brand's strengths?]

Rebellious Energy,
Modern Creativity,
Exclusive Travel and
Events, Quality
Products

Professional,
Fun, Funky,
Innovative and
ahead of the pack

WEAKNESSES

[What are you NOT doing?]

Solidify who we are
as a brand by
communicating with
our consumer to find
out what they want
most.

We need to create a social strategy &
platform that will mold our brand identity.
By "creating buzz", This strategy will hype
our our ideal consumers and we will create
customers even prior to launching.

A True Modern
Vision
Organic,
Sustainable
Biodynamic
Products

Starting strong
with a unique,
strong marketing
campaign and
social strategy.

We want to do *a
lot* of things, the
right way.

Dates and a location
should not withhold
our growth and we
should move forward
with our social
presence.

Expert Wine and
Spirit Knowledge &
Education

Create a brand that is
exciting and
undeniably unique.

Always being
innovative, but
focus all our
effort on a few
realistic,
solidiafiable
services we can
provide

OPPORTUNITIES

THREATS

We will maintain these accounts:

INSTAGRAM: @WINEMODERNE

- **Goal:** Create website traffic, increase brand awareness, drive event and product sales.
- **What it's best for:** Primary emphasis of our social media presence. Wine Moderne is a lifestyle brand, Instagram will drive website traffic through engaging content, brand personality, and creating a true conversation with the consumer through social listening.
- **Target audience:** **50% Millennials**, 1984 and younger, wine lovers, future Leaders, both socially active & digitally present. **40% Gen X**, 1965-1984 Active leaders, homeowners, professionals of middle-high disposable income.
- **Types of content we will share:** Posts that are true to the Wine Moderne Lifestyle, Events, Travel, Education, Features, and Quirky Illustrations and Sayings.
- **Key performance indicators (KPIs):** Social Strategy, Social Listening, measured by Analytics and true consumer feedback.

FACEBOOK & EVENTBRITE:

- **What it's best for:** Secondary Presence, Facebook, primarily for re-posting purposes. EventBrite in direct sales to local Wine Moderne events and ticket sales.

Content Strategy

Posting

The type of original content that we will create and post is:

- ⅓ of content promotes business and converts audience - travel, events, tastings
- ⅓ of content shares ideas and stories from thought leaders - personality via Q&A, sayings, illustrations, blog posts, and podcast series.
- ⅓ is original brand content - Wine Moderne Sustainable Wine Subscription, Somm Guided Travel, Cannabis Infused Dinners, Sake, Champagne, and Wine Tastings, Mind + Body + Wine Classes, #50shadesofgrape Rose pairing, Professional Wine Education & Certification, custom products and gifts.

The type of related content we will share is:

Content related to history, culture, health and wellness, content to educate and celebrate the viewer, posts to inspire travel and curiosity.

We will post to the following channels this frequently:

- [Instagram channel / 3 x per week, 1 post per day, M W F]
- Using Sprout Social, we schedule creative content at scheduled times to target our ideal consumer.

Process

The audience that we need to tailor content to is:

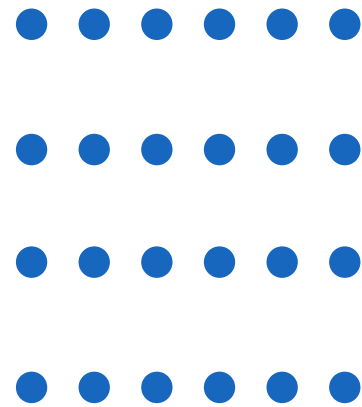
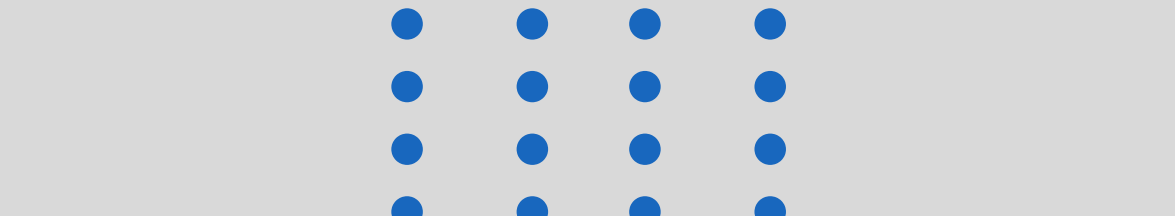
Mix of all content, which categorizes with a focus on events, features, education and lifestyle. Brand Categories using Story Highlights specific to Wine Moderne Events and Exclusives (ex. "Rose is Bae", "50 Shades to Grape").

The editorial calendar that maps out our content release schedule is here:

- (1) Monday: Travel Wed: Lifestyle Friday: Sayings
- (2) Monday: Event, Wed: Feature, Friday: Lifestyle
- (3) Monday: Education, Wed: Event, Friday: Travel
- (4) Monday: Lifestyle, Wed: Feature, Friday: Sayings

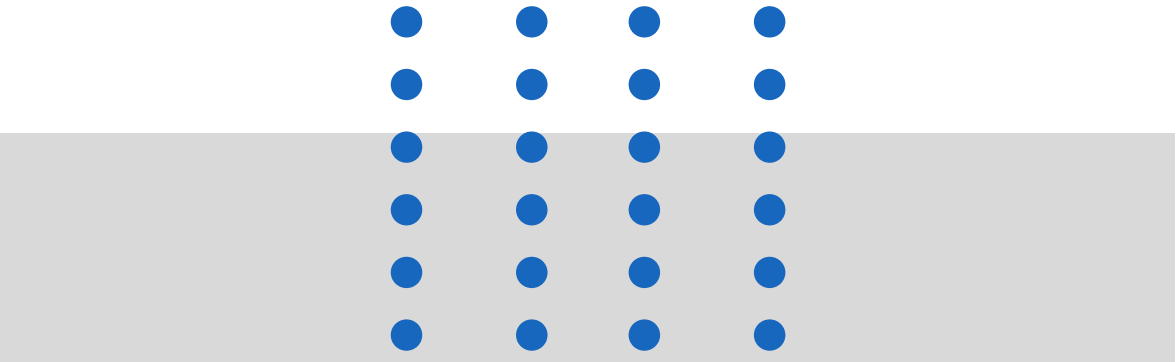
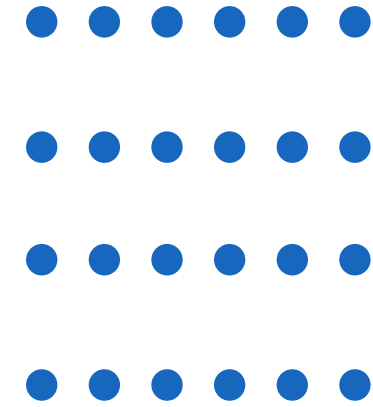
Action items

- **Ideal Posting Times MWF:**
- **Monday PST:**
 - Target Times: 9:00 AM - 3:00 PM
 - Highest Engagement: **2:00 PM - 3:00 PM**
- **Wednesday PST:**
 - Target Times: 5:00 AM, 9:00 AM - 1:00 PM
 - Highest Engagement: **9:00 AM-1:00 PM**
- **Friday PST:**
 - Target Times: 5:00 AM, 7:00 AM - 2:00 PM
 - Highest Engagement: **5:00 AM**



PROPOSAL ATTACHMENTS

SECTION D



ATTACHMENT A: STATEMENT OF COMPLIANCE

Instructions: Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

No Exceptions. The undersigned declares that the Proposal submitted by (Name of Firm) _____ to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.

Signature

Date

Printed Name and Title

Exceptions. By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) City of Newport Beach Steering Committee has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

Angela DiPasquale
Signature

04/11/2019

Date

Angela DiPasquale, Applicant
Printed Name and Title

[Attach a separate sheet(s) detailing each exception being taken]

ATTACHMENT B: PROPOSER INFORMATION FORM

Instructions: Complete the form below and remit as part of your Proposal as Attachment B.

CONSULTANT INFORMATION

CONSULTANT/FIRM NAME: Angela DiPasquale

ADDRESS FOR NOTICES: 815 Seagull Lane DS 101
Newport Beach, CA 92663

MAIN CONTACT (NAME AND TITLE): _____

CONTACT NUMBERS: TELEPHONE: (949) 887-0079 FAX: _____

E-MAIL ADDRESS: theadventuresofangela@gmail.com

FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

1. CONSULTANT AUTHORIZED SIGNATORY(IES):

	Diane B. Dixon	Mayor of Newport Beach	02/22/2019
SIGNATURE	PRINT NAME	TITLE	DATE
	Aaron Harp	City Attourney	02/22/2019
SIGNATURE	PRINT NAME	TITLE	DATE

2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:

- ☒ Proposer's Bylaws/ Operating Agreement Section K-1 ☒ Copy Attached
- ☒ Board Resolution Council Resolution No. 2019-7, Resolution No. 2019-20 ☒ Copy Attached
- ☐ Corporations or Business and Professions Code**

**If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

IMPORTANT NOTE: If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

RESOLUTION NO. 2019-7

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF NEWPORT BEACH, CALIFORNIA, INITIATING AMENDMENTS TO THE GENERAL PLAN AND LOCAL COASTAL PROGRAM AND CREATING THE GENERAL PLAN UPDATE STEERING COMMITTEE

WHEREAS, the last comprehensive update to the City of Newport Beach's General Plan ("General Plan") occurred in 2006;

WHEREAS, the General Plan provides a framework for the City's future development and requires comprehensive updates from time-to-time to ensure the General Plan matches the desires of the community and complies with State mandates;

WHEREAS, since the last comprehensive update of the General Plan, there have been changes in State planning law which affect the General Plan;

WHEREAS, the City Council desires the community to review and update the General Plan and amend the Local Coastal Program ("LCP") as necessary to maintain consistency between the General Plan and the LCP;

WHEREAS, the City Council values and respects the opinions, knowledge, and experiences of its residents, and desires residents to play an important role in the process of updating the General Plan;

WHEREAS, the City Council desires to form a General Plan Update Steering Committee, comprised of the Mayor, who shall be an ex officio member without the power to vote, and five (5) residents, who shall be appointed by the Mayor and confirmed by the City Council; and

WHEREAS, the General Plan Update Steering Committee will be responsible for: (1) ensuring there is sufficient public outreach and stakeholder input regarding the update to the General Plan; (2) providing guidance to City staff regarding the preparation of a Request for Proposal for services to update the General Plan; (3) reviewing responses to the Request for Proposal; (4) making a recommendation to the City Council regarding the selection of a consultant to assist in updating the General Plan; (5) providing guidance to City staff and the consultant through the "Listen and Learn" process; and (6) making other recommendations to the City Council regarding the update of the General Plan, as necessary.

NOW, THEREFORE, the City Council of the City of Newport Beach resolves as follows:

Section 1: The City Council hereby initiates a General Plan amendment and LCP amendment in accordance with City Council Policy K-1.

Section 2: The City Council hereby creates the General Plan Update Steering Committee. The General Plan Update Steering Committee shall be an ad hoc committee and the term, qualification of appointees, selection of appointees, appointment process, membership, and responsibilities of the General Plan Update Committee shall be done in conformance with this resolution and Attachment 1, which is incorporated herein by reference.

Section 3: If any section, subsection, sentence, clause or phrase of this resolution is for any reason held to be invalid or unconstitutional, such decision shall not affect the validity or constitutionality of the remaining portions of this resolution. The City Council hereby declares that it would have passed this resolution and each section, subsection, sentence, clause or phrase hereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses or phrases be declared invalid or unconstitutional.

Section 4: The recitals provided in this resolution are true and correct and are incorporated into the substantive portion of this resolution.

Section 5: The City Council finds the adoption of this resolution, the initiation of a General Plan amendment and LCP amendment, and the creation of the General Plan Update Steering Committee, are not subject to the California Environmental Quality Act ("CEQA") pursuant to Sections 15060(c)(2) (the activity will not result in a direct or reasonably foreseeable indirect physical change in the environment) and 15060(c)(3) (the activity is not a project as defined in Section 15378) of the CEQA Guidelines, California Code of Regulations, Title 14, Chapter 3, because it has no potential for resulting in physical change to the environment, directly or indirectly.

Section 6: This resolution shall take effect immediately upon its adoption by the City Council, and the City Clerk shall certify the vote adopting this resolution.

ADOPTED this 22nd day of January, 2019.



Diane B. Dixon
Mayor

ATTEST:


Leilani I. Brown
City Clerk



APPROVED AS TO FORM:
CITY ATTORNEY'S OFFICE


Aaron C. Harp
City Attorney

Attachment 1: Description of the General Plan Update Steering Committee

RESOLUTION NO. 2019- 20

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF NEWPORT BEACH, CALIFORNIA, AMENDING THE MEMBERSHIP OF THE GENERAL PLAN UPDATE STEERING COMMITTEE

WHEREAS, on January 22, 2019, the City Council adopted Resolution No. 2019-7, establishing the General Plan Update Steering Committee ("Committee") to assist the City of Newport Beach ("City") to review and update the City's General Plan ("General Plan");

WHEREAS, the Committee is responsible for: (1) ensuring there is sufficient public outreach and stakeholder input regarding the update to the General Plan; (2) providing guidance to City staff regarding the preparation of a Request for Proposal for services to update the General Plan; (3) reviewing responses to the Request for Proposal; (4) making a recommendation to the City Council regarding the selection of a consultant to assist in updating the General Plan; (5) providing guidance to City staff and the consultant through the "Listen and Learn" process; and (6) making other recommendations to the City Council regarding the update of the General Plan, as necessary;

WHEREAS, Resolution No. 2019-7 provided that the Committee is comprised of the Mayor and five residents, appointed by the Mayor and confirmed by the City Council; and

WHEREAS, the City Council desires to increase the membership of the Committee to eight members, comprised of the Mayor, who shall be an ex officio member without the power to vote, and seven residents, who shall be appointed by the Mayor and confirmed by the City Council.

NOW, THEREFORE, the City Council of the City of Newport Beach resolves as follows:

Section 1: The City Council hereby amends the Committee to increase the membership of the Committee to eight members, comprised of the Mayor, who shall be an ex officio member without the power to vote, and seven residents, who shall be appointed by the Mayor and confirmed by the City Council.

Section 2: The five resident members of the Committee appointed by the Mayor and confirmed by the City Council at the February 12, 2019, City Council meeting shall continue to be members of the Committee.

Section 3: The Committee shall continue to be an ad hoc committee and the term, qualification of appointees, selection of appointees, appointment process, membership, and responsibilities of the Committee shall be done in conformance with this resolution and Attachment 1, which is incorporated herein by reference.

Section 4: The City Council hereby repeals Resolution No. 2019-7.


Section 5: If any section, subsection, sentence, clause or phrase of this resolution is for any reason held to be invalid or unconstitutional, such decision shall not affect the validity or constitutionality of the remaining portions of this resolution. The City Council hereby declares that it would have passed this resolution and each section, subsection, sentence, clause or phrase hereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses or phrases be declared invalid or unconstitutional.

Section 6: The recitals provided in this resolution are true and correct and are incorporated into the substantive portion of this resolution.

Section 7: The City Council finds the adoption of this resolution is not subject to the California Environmental Quality Act ("CEQA") pursuant to Sections 15060(c)(2) (the activity will not result in a direct or reasonably foreseeable indirect physical change in the environment) and 15060(c)(3) (the activity is not a project as defined in Section 15378) of the CEQA Guidelines, California Code of Regulations, Title 14, Chapter 3, because it has no potential for resulting in physical change to the environment, directly or indirectly.

Section 8: This resolution shall take effect immediately upon its adoption by the City Council, and the City Clerk shall certify the vote adopting this resolution.

ADOPTED this 26th day of February 2019.



Diane B. Dixon
Mayor


ATTEST:



Leilani I. Brown
City Clerk



APPROVED AS TO FORM:
CITY ATTORNEY'S OFFICE



Aaron C. Harp
City Attorney

Attachment 1: Description of the General Plan Update Steering Committee

ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:

PART 1: TECHNICAL PROPOSAL SECTION

SECTION A: PROPOSER BACKGROUND



COVER LETTER

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bind the Proposer to contractual obligations.



ORGANIZATIONAL STRUCTURE

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

SECTION B: METHODOLOGY



PROPOSAL – METHODOLOGY

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.



ANTICIPATED WORK SCHEDULE

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

SECTION C: PROPOSER EXPERIENCE



MINIMUM REQUIREMENT: EXPERIENCE

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.

**REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

SECTION D: PROPOSAL ATTACHMENTS**ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

**ATTACHMENT B: PROPOSER INFORMATION FORM****ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST****OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

PART 2: COMPENSATION PROPOSAL SECTION**COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

SUBMISSION INSTRUCTIONS**ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

**ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

**{ON-CALL} PROFESSIONAL SERVICES
AGREEMENT
WITH Newport Beach FOR
Angela DiPasquale**

THIS {ON-CALL} PROFESSIONAL SERVICES AGREEMENT ("Agreement") is made and entered into as of this 20th day of 6/19 ("Effective Date"), by and between the CITY OF NEWPORT BEACH, a California municipal corporation and charter city ("City"), and Angela DiPasquale, a Consultant ("Consultant"), whose address is 815 Seagull Lane, and is made with reference to the following:

DS 101 NB, CA 92663

RECITALS

- A. City is a municipal corporation duly organized and validly existing under the laws of the State of California with the power to carry on its business as it is now being conducted under the statutes of the State of California and the Charter of City.
- B. City desires to engage Consultant to RFP No. 19-69 ("Project").
- C. Consultant possesses the skill, experience, ability, background, certification and knowledge to provide the professional services described in this Agreement.
- D. City has solicited and received a proposal from Consultant, has reviewed the previous experience and evaluated the expertise of Consultant, and desires to retain Consultant to render professional services under the terms and conditions set forth in this Agreement.

NOW, THEREFORE, it is mutually agreed by and between the undersigned parties as follows:

1. TERM

The term of this Agreement shall commence on the Effective Date, and shall terminate on 02/19/2019, unless terminated earlier as set forth herein.

2. SERVICES TO BE PERFORMED

Consultant shall diligently perform all the services described in the Scope of Services attached hereto as Exhibit A and incorporated herein by reference ("Services" or "Work"). City may elect to delete certain Services within the Scope of Services at its sole discretion.

3. SERVICES TO BE PERFORMED {ON-CALL AGREEMENT}

3.1 Consultant shall perform the on-call services described in the Scope of Services attached hereto as Exhibit A and incorporated herein by reference ("Services" or "Work"). Upon written request from the Project Administrator as defined herein, Consultant shall provide a letter proposal for Services requested by the City (hereinafter referred to as the "Letter Proposal"). The Letter Proposal shall include the following:

3.1.1 A detailed description of the Services to be provided;

3.1.2 The position of each person to be assigned to perform the Services, and the name of the individuals to be assigned, if available;

3.1.3 The estimated number of hours and cost to complete the Services; and

3.1.4 The time needed to finish the specific project.

3.2 No Services shall be provided until the Project Administrator has provided written acceptance of the Letter Proposal. Once authorized to proceed, Consultant shall diligently perform the duties in the approved Letter Proposal.

4. TIME OF PERFORMANCE

4.1 Time is of the essence in the performance of Services under this Agreement and Consultant shall perform the Services in accordance with the schedule included in Exhibit A {and the Letter Proposal}. In the absence of a specific schedule, the Services shall be performed to completion in a diligent and timely manner. The failure by Consultant to strictly adhere to the schedule set forth in Exhibit A {and the Letter Proposal}, if any, or perform the Services in a diligent and timely manner may result in termination of this Agreement by City.

4.2 Notwithstanding the foregoing, Consultant shall not be responsible for delays due to causes beyond Consultant's reasonable control. However, in the case of any such delay in the Services to be provided for the Project, each party hereby agrees to provide notice within two (2) calendar days of the occurrence causing the delay to the other party so that all delays can be addressed.

4.3 Consultant shall submit all requests for extensions of time for performance in writing to the Project Administrator as defined herein not later than ten (10) calendar days after the start of the condition that purportedly causes a delay. The Project Administrator shall review all such requests and may grant reasonable time extensions for unforeseeable delays that are beyond Consultant's control.

4.4 For all time periods not specifically set forth herein, Consultant shall respond in the most expedient and appropriate manner under the circumstances, by hand-delivery or mail.

5. COMPENSATION TO CONSULTANT

5.2 Consultant shall submit monthly invoices to City describing the Work performed the preceding month. Consultant's bills shall include the name of the person who performed the Work, a brief description of the Services performed and/or the specific task in the Scope of Services to which it relates, the date the Services were performed, the number of hours spent on all Work billed on an hourly basis, and a description of any reimbursable expenditures. City shall pay Consultant no later than thirty (30) calendar days after approval of the monthly invoice by City staff.

5.3 City shall reimburse Consultant only for those costs or expenses specifically identified in Exhibit B to this Agreement {and the Letter Proposal} or specifically approved in writing in advance by City.

5.4 Consultant shall not receive any compensation for Extra Work performed without the prior written authorization of City. As used herein, "Extra Work" means any Work that is determined by City to be necessary for the proper completion of the Project, but which is not included within the Scope of Services and which the parties did not reasonably anticipate would be necessary at the execution of this Agreement.

Compensation for any authorized Extra Work shall be paid in accordance with the Schedule of Billing Rates as set forth in Exhibit B {and the Letter Proposal}.

6. PROJECT MANAGER

6.1 Consultant shall designate a Project Manager, who shall coordinate all phases of the Project. This Project Manager shall be available to City at all reasonable times during the Agreement term. Consultant has designated Ben Zdeba to be its Project Manager. Consultant shall not remove or reassign the Project Manager or any personnel listed in Exhibit A or assign any new or replacement personnel to the Project without the prior written consent of City. City's approval shall not be unreasonably withheld with respect to the removal or assignment of non-key personnel.

6.2 Consultant, at the sole discretion of City, shall remove from the Project any of its personnel assigned to the performance of Services upon written request of City. Consultant warrants that it will continuously furnish the necessary personnel to complete the Project on a timely basis as contemplated by this Agreement.

6.3 If Consultant is performing inspection services for City, the Project Manager and any other assigned staff shall be equipped with a cellular phone to communicate with City staff. The Project Manager's cellular phone number shall be provided to City.

7. ADMINISTRATION

This Agreement will be administered by the Ben Zdeba ^{General Steering Plan} City's ^{Associate Planner} or designee shall be the Project Administrator and shall have the authority to act for City under this Agreement. The Project Administrator shall represent City in all matters pertaining to the Services to be rendered pursuant to this Agreement.

8. CITY'S RESPONSIBILITIES

To assist Consultant in the execution of its responsibilities under this Agreement,

City agrees to provide access to and upon request of Consultant, one copy of all existing relevant information on file at City. City will provide all such materials in a timely manner so as not to cause delays in Consultant's Work schedule.

9. STANDARD OF CARE

9.1 All of the Services shall be performed by Consultant or under Consultant's supervision. Consultant represents that it possesses the professional and technical personnel required to perform the Services required by this Agreement, and that it will perform all Services in a manner commensurate with community professional standards and with the ordinary degree of skill and care that would be used by other reasonably competent practitioners of the same discipline under similar circumstances. All Services shall be performed by qualified and experienced personnel who are not employed by City. By delivery of completed Work, Consultant certifies that the Work conforms to the requirements of this Agreement, all applicable federal, state and local laws, and legally recognized professional standards. Consultant represents and warrants to City that it has, shall obtain, and shall keep in full force and effect during the term hereof, at its sole cost and expense, all licenses, permits, qualifications, insurance and approvals of whatsoever nature that is legally required of Consultant to practice its profession. Consultant shall maintain a City of Newport Beach business license during the term of this Agreement.

9.2 Consultant shall not be responsible for delay, nor shall Consultant be responsible for damages or be in default or deemed to be in default by reason of strikes, lockouts, accidents, acts of God, or the failure of City to furnish timely information or to approve or disapprove Consultant's Work promptly, or delay or faulty performance by City, contractors, or governmental agencies.

10. HOLD HARMLESS

10.1 To the fullest extent permitted by law, Consultant shall indemnify, defend and hold harmless City, its City Council, boards and commissions, officers, agents, volunteers, employees and any person or entity owning or otherwise in legal control of the property upon which Consultant performs the Project and/or Services contemplated by this (collectively, the "Indemnified Parties), from and against any and all claims (including, without limitation, claims for bodily injury, death or damage to property), demands, obligations, damages, actions, causes of action, suits, losses, judgments, fines, penalties, liabilities, costs and expenses (including, without limitation, attorneys' fees, disbursements and court costs) of every kind and nature whatsoever (individually, a Claim; collectively, "Claims"), and which may arise from or in any manner relate (directly or indirectly) to any breach the negligence, recklessness, or willful misconduct of the terms and conditions of this Agreement, any work performed or Services provided under this Agreement including, without limitation, defects in workmanship or materials or Consultant's presence or activities conducted on the Project (including the negligent, reckless, and/or willful acts, errors and/or omissions of Consultant or its principals, officers, agents, employees, vendors, suppliers, subconsultants, subcontractors, anyone employed directly or indirectly by any of them or for whose acts they may be liable, or any or all of them.

10.2 Notwithstanding the foregoing, nothing herein shall be construed to require Consultant to indemnify the Indemnified Parties from any Claim arising from the sole negligence, active negligence or willful misconduct of the Indemnified Parties. Nothing in this indemnity shall be construed as authorizing any award of attorneys' fees in any action on or to enforce the terms of this Agreement. This indemnity shall apply to all claims and liability regardless of whether any insurance policies are applicable. The policy limits do not act as a limitation upon the amount of indemnification to be provided by the Consultant.

11. INDEPENDENT CONTRACTOR

11.1 It is understood that City retains Consultant on an independent contractor basis and Consultant is not an agent or employee of City. The manner and means of conducting the Work are under the control of Consultant, except to the extent they are limited by statute, rule or regulation and the expressed terms of this Agreement. No civil service status or other right of employment shall accrue to Consultant or its employees. Nothing in this Agreement shall be deemed to constitute approval for Consultant or any of Consultant's employees or agents, to be the agents or employees of City. Consultant shall have the responsibility for and control over the means of performing the Work, provided that Consultant is in compliance with the terms of this Agreement. Anything in this Agreement that may appear to give City the right to direct Consultant as to the details of the performance of the Work or to exercise a measure of control over Consultant shall mean only that Consultant shall follow the desires of City with respect to the results of the Services.

11.2 Consultant agrees and acknowledges that no individual performing Services or Work pursuant to this Agreement shall: work full-time for more than six (6) months; work regular part-time service of at least an average of twenty (20) hours per week for one year or longer; work nine hundred sixty (960) hours in any fiscal year; or already be a CalPERS member.

11.3 Consultant must submit to and pass a criminal background investigation by providing a complete set of fingerprints to City prior to commencing or performing Services or Work. Consultant is required to submit any fees for the criminal background investigation according to the City's most current administrative fee schedule or successor document. Fingerprints may be required to be updated every five (5) years.

12. COOPERATION

Consultant agrees to work closely and cooperate fully with City's designated Project Administrator and any other agencies that may have jurisdiction or interest in the Work to be performed. City agrees to cooperate with the Consultant on the Project.

13. CITY POLICY

Consultant shall discuss and review all matters relating to policy and Project direction with City's Project Administrator in advance of all critical decision points in order to ensure the Project proceeds in a manner consistent with City goals and policies.

14. PROGRESS

Consultant is responsible for keeping the Project Administrator informed on a regular basis regarding the status and progress of the Project, activities performed and planned, and any meetings that have been scheduled or are desired.

15. INSURANCE

Without limiting Consultant's indemnification of City, and prior to commencement of Work, Consultant shall obtain, provide and maintain at its own expense during the term of this Agreement or for other periods as specified in this Agreement, policies of insurance of the type, amounts, terms and conditions described in the Insurance Requirements attached hereto as Exhibit C, and incorporated herein by reference.

16. PROHIBITION AGAINST ASSIGNMENTS AND TRANSFERS

Except as specifically authorized under this Agreement, the Services to be provided under this Agreement shall not be assigned, transferred contracted or subcontracted out without the prior written approval of City. Any of the following shall be construed as an assignment: The sale, assignment, transfer or other disposition of any of the issued and outstanding capital stock of Consultant, or of the interest of any general partner or joint venturer or syndicate member or cotenant if Consultant is a partnership or joint-venture or syndicate or co-tenancy, which shall result in changing the control of Consultant. Control means fifty percent (50%) or more of the voting power or twenty-five percent (25%) or more of the assets of the corporation, partnership or joint-venture.

17. SUBCONTRACTING

The subcontractors authorized by City, if any, to perform Work on this Project are identified in Exhibit A {and the Letter Proposal}. Consultant shall be fully responsible to City for all acts and omissions of any subcontractor. Nothing in this Agreement shall create any contractual relationship between City and any subcontractor nor shall it create any obligation on the part of City to pay or to see to the payment of any monies due to any such subcontractor other than as otherwise required by law. City is an intended beneficiary of any Work performed by the subcontractor for purposes of establishing a duty of care between the subcontractor and City. Except as specifically authorized herein, the Services to be provided under this Agreement shall not be otherwise assigned, transferred, contracted or subcontracted out without the prior written approval of City.

18. OWNERSHIP OF DOCUMENTS

18.1 Each and every report, draft, map, record, plan, document and other writing produced, including but not limited to, websites, blogs, social media accounts and applications (hereinafter "Documents"), prepared or caused to be prepared by Consultant, its officers, employees, agents and subcontractors, in the course of implementing this Agreement, shall become the exclusive property of City, and City shall have the sole right to use such materials in its discretion without further compensation to Consultant or any other party. Additionally, all material posted in cyberspace by Consultant, its officers, employees, agents and subcontractors, in the course of implementing this Agreement, shall become the exclusive property of City, and City shall have the sole right to use such materials in its discretion without further compensation to Consultant or any other party.

Consultant shall, at Consultant's expense, provide such Documents, including all logins and password information to City upon prior written request.

18.2 Documents, including drawings and specifications, prepared by Consultant pursuant to this Agreement are not intended or represented to be suitable for reuse by City or others on any other project. Any use of completed Documents for other projects and any use of incomplete Documents without specific written authorization from Consultant will be at City's sole risk and without liability to Consultant. Further, any and all liability arising out of changes made to Consultant's deliverables under this Agreement by City or persons other than Consultant is waived against Consultant, and City assumes full responsibility for such changes unless City has given Consultant prior notice and has received from Consultant written consent for such changes.

18.3 All written documents shall be transmitted to City in formats compatible with Microsoft Office and/or viewable with Adobe Acrobat.

18.4 CADD data delivered to City shall include the professional stamp of the engineer or architect in charge of or responsible for the Work. City agrees that Consultant shall not be liable for claims, liabilities or losses arising out of, or connected with (a) the modification or misuse by City, or anyone authorized by City, of CADD data; (b) the decline of accuracy or readability of CADD data due to inappropriate storage conditions or duration; or (c) any use by City, or anyone authorized by City, of CADD data for additions to this Project, for the completion of this Project by others, or for any other Project, excepting only such use as is authorized, in writing, by Consultant. By acceptance of CADD data, City agrees to indemnify Consultant for damages and liability resulting from the modification or misuse of such CADD data. All original drawings shall be submitted to City in the version of AutoCAD used by the City in .dwg file format, on a CD, and should comply with the City's digital submission requirements for improvement plans available from the City's Public Works Department. The City will provide Consultant with City title sheets as AutoCAD file(s) in .dwg file format. All written documents shall be transmitted to City in formats compatible with Microsoft Office and/or viewable with Adobe Acrobat.

18.5 All improvement and/or construction plans shall be prepared with indelible waterproof ink or electrostatically plotted on standard twenty-four inch (24") by thirty-six inch (36") Mylar with a minimum thickness of three (3) mils. Consultant shall provide to City 'As-Built' drawings and a copy of digital Computer Aided Design and Drafting ("CADD") and Tagged Image File Format (.tiff) files of all final sheets within ninety (90) days after finalization of the Project. For more detailed requirements, a copy of the City of Newport Beach Standard Design Requirements is available from the City's Public Works Department.

19. OPINION OF COST

Any opinion of the construction cost prepared by Consultant represents the Consultant's judgment as a design professional and is supplied for the general guidance of City. Since Consultant has no control over the cost of labor and material, or over competitive bidding or market conditions, Consultant does not guarantee the accuracy of such opinions as compared to Consultant or contractor bids or actual cost to City.

20. CONFIDENTIALITY

All Documents, including drafts, preliminary drawings or plans, notes and communications that result from the Services in this Agreement, shall be kept confidential unless City expressly authorizes in writing the release of information.

21. INTELLECTUAL PROPERTY INDEMNITY

Consultant shall defend and indemnify City, its agents, officers, representatives and employees against any and all liability, including costs, for infringement or alleged infringement of any United States' letters patent, trademark, or copyright, including costs, contained in Consultant's Documents provided under this Agreement.

22. RECORDS

Consultant shall keep records and invoices in connection with the Services to be performed under this Agreement. Consultant shall maintain complete and accurate records with respect to the costs incurred under this Agreement and any Services, expenditures and disbursements charged to City, for a minimum period of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such records and invoices shall be clearly identifiable. Consultant shall allow a representative of City to examine, audit and make transcripts or copies of such records and invoices during regular business hours. Consultant shall allow inspection of all Work, data, Documents, proceedings and activities related to the Agreement for a period of three (3) years from the date of final payment to Consultant under this Agreement.

23. WITHHOLDINGS

City may withhold payment to Consultant of any disputed sums until satisfaction of the dispute with respect to such payment. Such withholding shall not be deemed to constitute a failure to pay according to the terms of this Agreement. Consultant shall not discontinue Work as a result of such withholding. Consultant shall have an immediate right to appeal to the City Manager or designee with respect to such disputed sums. Consultant shall be entitled to receive interest on any withheld sums at the rate of return that City earned on its investments during the time period, from the date of withholding of any amounts found to have been improperly withheld.

24. ERRORS AND OMISSIONS

In the event of errors or omissions that are due to the negligence or professional inexperience of Consultant which result in expense to City greater than what would have resulted if there were not errors or omissions in the Work accomplished by Consultant, the additional design, construction and/or restoration expense shall be borne by Consultant. Nothing in this Section is intended to limit City's rights under the law or any other sections of this Agreement.

25. CITY'S RIGHT TO EMPLOY OTHER CONSULTANTS

City reserves the right to employ other Consultants in connection with the Project.

26. CONFLICTS OF INTEREST

26.1 Consultant or its employees may be subject to the provisions of the California Political Reform Act of 1974 (the "Act"), which (1) requires such persons to disclose any financial interest that may foreseeably be materially affected by the Work performed under this Agreement, and (2) prohibits such persons from making, or participating in making, decisions that will foreseeably financially affect such interest.

26.2 If subject to the Act, Consultant shall conform to all requirements of the Act. Failure to do so constitutes a material breach and is grounds for immediate termination of this Agreement by City. Consultant shall indemnify and hold harmless City for any and all claims for damages resulting from Consultant's violation of this Section.

27. NOTICES

27.1 All notices, demands, requests or approvals, including any change in mailing address, to be given under the terms of this Agreement shall be given in writing, and conclusively shall be deemed served when delivered personally, or on the third business day after the deposit thereof in the United States mail, postage prepaid, first-class mail, addressed as hereinafter provided.

27.2 All notices, demands, requests or approvals from Consultant to City shall be addressed to City at:

Attn: Ben Zdeba 949-644-3253
bzdeba@newportbeachca.gov
City of Newport Beach
100 Civic Center Drive
PO Box 1768
Newport Beach, CA 92658

27.3 All notices, demands, requests or approvals from City to Consultant shall be addressed to Consultant at:

Attn: Angela DiPasquale 949-887-0079
815 Seagull Lane DS 101
NB, CA 92663
theadventuresofangela@gmail.com

28. CLAIMS

Unless a shorter time is specified elsewhere in this Agreement, before making its final request for payment under this Agreement, Consultant shall submit to City, in writing, all claims for compensation under or arising out of this Agreement. Consultant's acceptance of the final payment shall constitute a waiver of all claims for compensation under or arising out of this Agreement except those previously made in writing and identified by Consultant in writing as unsettled at the time of its final request for payment. Consultant and City expressly agree that in addition to any claims filing requirements set forth in the Agreement, Consultant shall be required to file any claim Consultant may have against City in strict conformance with the Government Claims Act (Government Code

sections 900 *et seq.*).

28.2 To the extent that Consultant's claim is a "Claim" as defined in Public Contract Code section 9204 or any successor statute thereto, the Parties agree to follow the dispute resolution process set forth therein. Any part of such "Claim" remaining in dispute after completion of the dispute resolution process provided for in Public Contract Code section 9204 or any successor statute thereto shall be subject to the Government Claims Act requirements requiring Consultant to file a claim in strict conformance with the Government Claims Act. To the extent that Contractor/Consultant's claim is not a "Claim" as defined in Public Contract Code section 9204 or any successor statute thereto, Consultant shall be required to file such claim with the City in strict conformance with the Government Claims Act (Government Code sections 900 *et seq.*).

29. TERMINATION

29.1 In the event that either party fails or refuses to perform any of the provisions of this Agreement at the time and in the manner required, that party shall be deemed in default in the performance of this Agreement. If such default is not cured within a period of two (2) calendar days, or if more than two (2) calendar days are reasonably required to cure the default and the defaulting party fails to give adequate assurance of due performance within two (2) calendar days after receipt of written notice of default, specifying the nature of such default and the steps necessary to cure such default, and thereafter diligently take steps to cure the default, the non-defaulting party may terminate the Agreement forthwith by giving to the defaulting party written notice thereof.

29.2 Notwithstanding the above provisions, City shall have the right, at its sole and absolute discretion and without cause, of terminating this Agreement at any time by giving no less than seven (7) calendar days' prior written notice to Consultant. In the event of termination under this Section, City shall pay Consultant for Services satisfactorily performed and costs incurred up to the effective date of termination for which Consultant has not been previously paid. On the effective date of termination, Consultant shall deliver to City all reports, Documents and other information developed or accumulated in the performance of this Agreement, whether in draft or final form.

30. PREVAILING WAGES

Pursuant to the applicable provisions of the Labor Code of the State of California, not less than the general prevailing rate of per diem wages including legal holidays and overtime Work for each craft or type of workman needed to execute the Work contemplated under the Agreement shall be paid to all workmen employed on the Work to be done according to the Agreement by the Consultant and any subcontractor. In accordance with the California Labor Code (Sections 1770 *et seq.*), the Director of Industrial Relations has ascertained the general prevailing rate of per diem wages in the locality in which the Work is to be performed for each craft, classification, or type of workman or mechanic needed to execute the Agreement. A copy of said determination is available by calling the prevailing wage hotline number (415) 703-4774, and requesting one from the Department of Industrial Relations. The Consultant is required to obtain the wage determinations from the Department of Industrial Relations and post at the job site the prevailing rate or per diem wages. It shall be the obligation of the Consultant or any subcontractor under him/her to comply with all State of California labor laws, rules and

regulations and the parties agree that the City shall not be liable for any violation thereof.

30.1 Unless otherwise exempt by law, Consultant warrants that no contractor or subcontractor was listed on the bid proposal for the Services that it is not currently registered and qualified to perform public work. Consultant further warrants that it is currently registered and qualified to perform “public work” pursuant to California Labor Code section 1725.5 or any successor statute thereto and that no contractor or subcontractor will engage in the performance of the Services unless currently registered and qualified to perform public work.

31. PREVAILING WAGES {MODIFIED PREVAILING WAGES}

31.1 If any of the Work contemplated under the Agreement is considered a “public work”, pursuant to the applicable provisions of the Labor Code of the State of California, including but not limited to Section 1720 *et seq.*, not less than the general prevailing rate of per diem wages including legal holidays and overtime Work for each craft or type of workman shall be paid to all workmen employed on such. In accordance with the California Labor Code (Sections 1770 *et seq.*), the Director of Industrial Relations has ascertained the general prevailing rate of per diem wages in the locality in which the Work is to be performed for each craft, classification, or type of workman or mechanic needed to execute the Agreement. A copy of said determination is available by calling the prevailing wage hotline number (415) 703-4774, and requesting one from the Department of Industrial Relations. The Consultant is required to obtain the wage determinations from the Department of Industrial Relations and post at the job site the prevailing rate or per diem wages. It shall be the obligation of the Consultant or any subcontractor under him/her to comply with all State of California labor laws, rules and regulations and the parties agree that the City shall not be liable for any violation thereof.

31.2 In such event, unless otherwise exempt by law, Consultant warrants that no contractor or subcontractor was listed on the bid proposal for the Services that it is not currently registered and qualified to perform public work. Consultant further warrants that it is currently registered and qualified to perform “public work” pursuant to California Labor Code section 1725.5 or any successor statute thereto and that no contractor or subcontractor will engage in the performance of the Services unless currently registered and qualified to perform public work.

32. STANDARD PROVISIONS

32.1 Recitals. City and Consultant acknowledge that the above Recitals are true and correct and are hereby incorporated by reference into this Agreement.

32.2 Compliance with all Laws. Consultant shall, at its own cost and expense, comply with all statutes, ordinances, regulations and requirements of all governmental entities, including federal, state, county or municipal, whether now in force or hereinafter enacted. In addition, all Work prepared by Consultant shall conform to applicable City, county, state and federal laws, rules, regulations and permit requirements and be subject to approval of the Project Administrator and City.

32.3 Waiver. A waiver by either party of any breach, of any term, covenant or

condition contained herein shall not be deemed to be a waiver of any subsequent breach of the same or any other term, covenant or condition contained herein, whether of the same or a different character.

32.4 Integrated Contract. This Agreement represents the full and complete understanding of every kind or nature whatsoever between the parties hereto, and all preliminary negotiations and agreements of whatsoever kind or nature are merged herein. No verbal agreement or implied covenant shall be held to vary the provisions herein.

32.5 Conflicts or Inconsistencies. In the event there are any conflicts or inconsistencies between this Agreement and the Scope of Services or any other attachments attached hereto, the terms of this Agreement shall govern.

32.6 Interpretation. The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either party by reason of the authorship of the Agreement or any other rule of construction which might otherwise apply.

32.7 Amendments. This Agreement may be modified or amended only by a written document executed by both Consultant and City and approved as to form by the City Attorney.

32.8 Severability. If any term or portion of this Agreement is held to be invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions of this Agreement shall continue in full force and effect.

32.9 Controlling Law and Venue. The laws of the State of California shall govern this Agreement and all matters relating to it and any action brought relating to this Agreement shall be adjudicated in a court of competent jurisdiction in the County of Orange, State of California.

32.10 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer and it shall not discriminate against any subcontractor, employee or applicant for employment because race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status, sex, sexual orientation, age or any other impermissible basis under law.

32.11 No Attorneys' Fees. In the event of any dispute or legal action arising under this Agreement, the prevailing party shall not be entitled to attorneys' fees.

32.12 Counterparts. This Agreement may be executed in two (2) or more counterparts, each of which shall be deemed an original and all of which together shall constitute one (1) and the same instrument.

[SIGNATURES ON NEXT PAGE]

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed on the dates written below.

**APPROVED AS TO FORM:
CITY ATTORNEY'S OFFICE**

Date: _____

By: Aaron C. Harp
City Attorney

ATTEST:

Date: _____

By: Leilani I. Brown
City Clerk

CITY OF NEWPORT BEACH,
a California municipal corporation

Date: _____

By: Ben Zdeba
City Associate Planner

CONSULTANT: Angela DiPasquale, a
Consultant

Date: 04/20/2019

By: _____

Date: _____

By: _____

[END OF SIGNATURES]

Attachments: Exhibit A – Scope of Services
Exhibit B – Schedule of Billing Rates
Exhibit C – Insurance Requirements

(This page left intentionally blank.)



2099 S State College Blvd, Suite 630, Anaheim CA 92806
Phone 949.336.4500
jerry@fsbcorestrategies.com.com



RFP NO. 19-69

COMMUNITY ENGAGEMENT RELATED TO A FUTURE GENERAL PLAN UPDATE



Prepared for:

Anthony Nguyen,
Purchasing Agent



City of Newport Beach

100 Civic Center Dr, Newport, CA 92660
Phone 949-644-3309



Proposal Issued: 04.26.2019

Table of Contents

COVER LETTER.....3

ORGANIZATION STRUCTURE.....4

TEAM RESUMES.....5

METHODOLOGY.....8

EXPERIENCE & FIRM PROFILE.....12

CASE STUDIES.....14

REFERENCES.....17

ATTACHMENTS.....18

Cover Letter

April 26, 2019

Anthony Nguyen, Purchasing Agent
City of Newport Beach
100 Civic Center Drive
Newport Beach, CA 92660

Dear Mr. Nguyen:

FSB Public Affairs, Inc. ("FSBPA") is grateful for the opportunity to assist the City of Newport Beach with its community engagement related to a future General Plan update. We've put together an integrated team that provides comprehensive experience in public outreach and stakeholder communications, coupled with an unparalleled background in working with private sector companies and government agencies including municipalities, and their local constituencies.

As the prime contractor, FSBPA will have contractual responsibility with the City. By way of this letter FSBPA is formally acknowledging receipt of the full RFP and addenda No. 1 (and any others if applicable) and has developed this proposal in accordance with those documents. Likewise, we attest that all information submitted with this proposal is true and correct. This proposal shall remain valid for a period of 180 days from the date above.

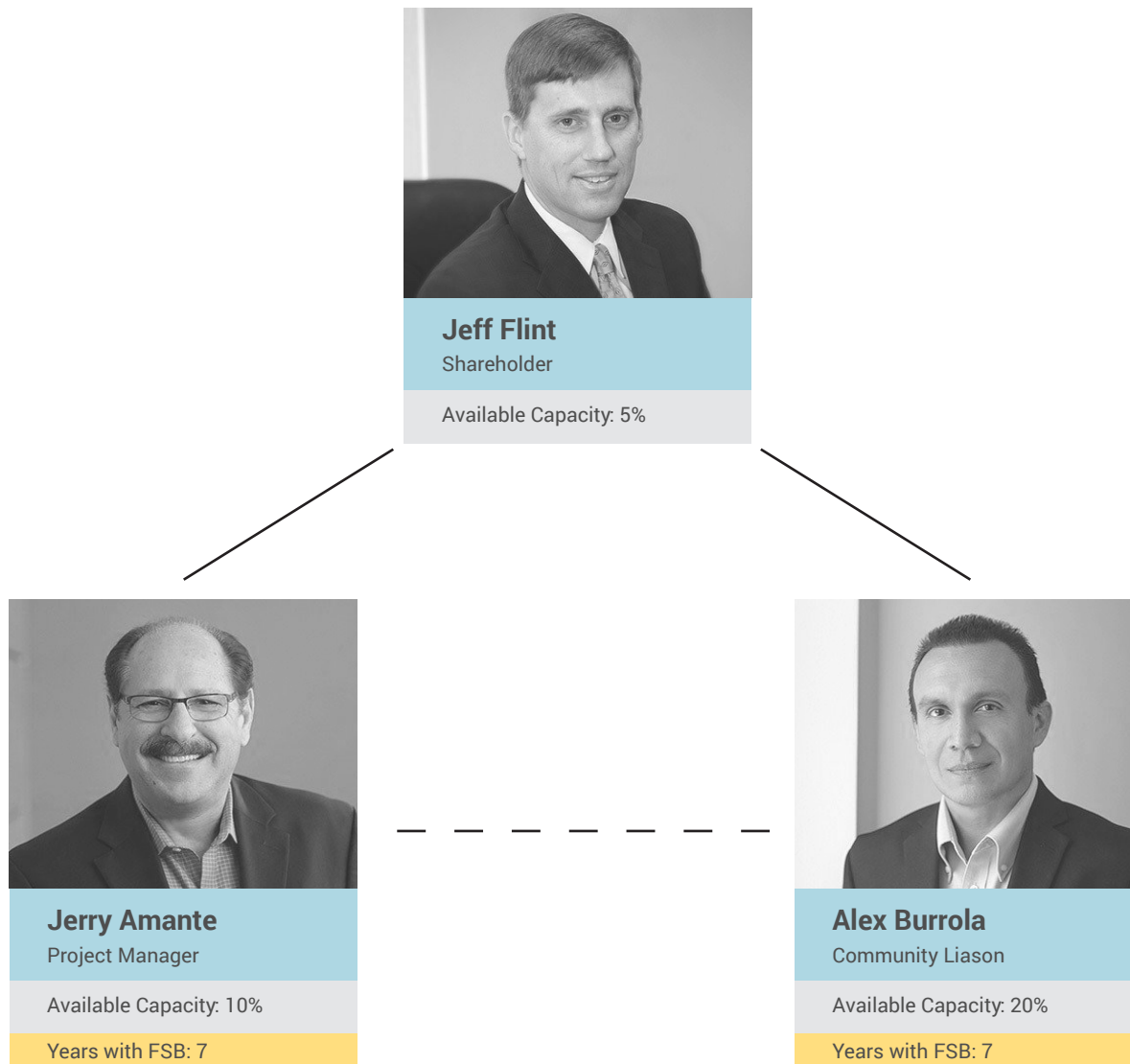
Thank you again for your consideration. We are the right team to help the City, and we look forward to the next step in this process.

Sincerely,



Jerry Amante
Senior Vice President and General Counsel
FSB Public Affairs, Inc.
Ph. 949-336-4500
FAX: 949-336-4501
jerry@fsbcorestrategies.com

Organization Structure



Team Resumes



Jeff Flint

President & CEO

FSB Core Strategies

Jeff is one of the most widely respected public affairs and political professionals in the state of California. A veteran of legislative and campaign operations, as well as major public relations campaigns, he has nearly 30 years in public policy and political experience in California, with service in the State Legislature from 1988 to 1999, and private sector experience in political campaigns and public affairs from 1999 to the present. He has owned his own public affairs firm continuously since 2001, under the banner of FSB Core Strategies since 2012. In his public service, Jeff served as Chief of Staff to former Assembly Speaker Curt Pringle. He is recognized for his ability to design a strategic plan uniquely tailored to each client and their public affairs or political needs. Critical to this design is selecting the appropriate tools for each plan, and then tactically executing the plan with precision and attention to detail.

Jeff's political experience shows a passion for transportation and economic development projects. His background with the State Legislature, as manager of a number of high profile public affairs campaigns across a number of issues, and as campaign manager on a number of major statewide and regional ballot issue campaigns (including campaign on both sides of tax issues), as well as a diverse group of clients including the Orange County Transportation Authority (OCTA), Placer County Transportation Planning Agency (PCTPA), the Anaheim/Orange County Visitor and Convention Bureau (AOCVCB), Anaheim Tourism Improvement District (ATID), and others shows a strategist with impeccable credentials who can appeal to constituencies across a wide range of outlooks and ideologies on behalf of doing what is right for their community.

EXPERIENCE:

- 12 years with FSB (including predecessor company)
- 30 years public relations/public affairs/political campaign/government experience
- 11 years in the State Legislature, managing campaigns including those of the Chief of Staff and Political Director at Assembly Speaker Curt Pringle's office
- Former Vice President at Russo, Marsh+Rogers, Inc.
- Former CEO of Flint Communications

COMMUNITY INVOLVEMENT:

- President and Board Chairman, Placer United Soccer Club (2013-Present), Board member since 2010

EDUCATION:

- Bachelor of Science, Political Science, California Institute of Technology

Team Resumes (cont.)



Jerry Amante

Senior Vice President &
General Counsel

FSB Core Strategies

Jerry serves as Senior Vice President and General Counsel for the firm. Based in Orange County, Jerry serves as General Manager of the Orange County office and leads business development efforts throughout the southern California region.

Jerry is the former Chairman of the Orange County Transportation Authority (OCTA) and served on a number of its committees, as part of a decades-long career in public service that has given him a wealth of experience in transportation, land use, and regional planning expertise. He is also a past President and member of the Executive Committee of the Association of California Cities-Orange County and served three terms as the Mayor of the City of Tustin and two terms as Mayor Pro Tem in his 8 years on the Council. Jerry was widely regarded as one of the most popular and effective elected officials in Orange County. In addition to his work in public affairs, Jerry is a practicing lawyer.

EXPERIENCE:

- Seven years at FSB
- Ten years in public office, including Council Member, Mayor and as a Board Member and Chairman of several regional government agencies. Thirty-Five years of practicing law in complex transactions and litigation in California; Admitted to all California State and Federal courts and the Ninth Circuit Court of Appeals.

COMMUNITY INVOLVEMENT:

- Former Mayor, City of Tustin
- Former Chairman of the Orange County Transportation Authority (OCTA) Board of Directors
- Former Chairman of the Transportation Corridor Authority (TCA) Board of Directors and member of numerous other Public and Private Boards of Directors

EDUCATION:

- Bachelor of Arts, Political Science, University of California Los Angeles
- Juris Doctor, Southwestern University School of Law

Team Resumes (cont.)



Alex Burrola

Senior Account Supervisor

FSB Core Strategies

Alex possesses more than 20 years' experience in public relations, public affairs, and political campaigns. Based in the firm's Southern California office, Alex is an integral member of FSB's Public Affairs practice. Serving in a leadership capacity for many of the firm's key public affairs

accounts, Alex's coalition-building and grassroots mobilization strategies are well known throughout the industry.

EXPERIENCE:

- Seven years with FSB
- Legislative tracking and analysis, coalition-building, message development, public outreach, campaign management
- Work on political organizations and campaigns spanning two decades
- Winner, Sacramento Public Relations Association Gold Award for News & Opinion Writing

COMMUNITY INVOLVEMENT:

- Board Member, North Orange County Chamber of Commerce
- Chairman, North Orange County Chamber Political Action Committee (NOC imPACT)
- Member, American Association of Political Consultants
- Member, Orange County Public Affairs Association
- Former Member, City of Fullerton Transportation Commission

EDUCATION:

- Bachelor of Arts, History; Bachelor of Arts, Political Science - Whittier College
- Graduate, Public Policy Makers Academy - University of California, Irvine

Methodology

FSB recognizes that any city's General Plan will be its roadmap for success in the coming years. Therefore, we will make it our mission to familiarize ourselves with the City of Newport Beach's existing General Plan, its key themes and prioritizes, and how it came to be the document that it is now.

With a number of state law changes in recent years, and even more that would have a significant impact on municipal general plans being proposed, we will have an especially attentive eye towards Sacramento and potentially impactful new legal requirements.

We will attend and be conscious participants and observers of all meetings of the General Plan Steering Committee, and ensure that the public sentiment expressed at all such meetings are accurately captured in notes, minutes and debriefs which follow.

The community engagement and outreach program lies at the heart of what it will mean to know the opinions of Newport Beach residents, and give the General Plan update an opportunity to reflect their values and concerns for the City. This kind of constituent feedback is vital. FSB regards the kind of data and information that we receive from this kind of community engagement as crucial, and in fact is the cornerstone of any campaign, public affairs effort, or community outreach plan that we devise. Without knowing where we are starting from, we cannot hope to get to where we need to go.

FSB is not new to this kind of community based engagement and involvement. For a number of past projects we have established outreach programs to educate constituents and give them ways to provide their opinion and feedback on any number of issues and topics. Any such program we establish to capture input on the General Plan update will successfully incorporate our past experience and best practices.



The end goal of course is to capture a detailed record and reflection of community-wide sentiments regarding the City and the General Plan. FSB will compile all records and documentation of such public feedback and use it to generate an in-total resource guide once the community outreach phase is complete.

It is anticipated that this guide will provide an overview of the outreach program's methodology and detail all issues of concern which were recorded during outreach. This resource will be invaluable to the Steering Committee as it evaluates and finalizes its recommended General Plan updates.

Methodology (cont.)

To specifically address each point in the Scope of Services, FSB will execute on the following:

1

Review General Plan, Elements, Goals and Policies

FSB recognizes the kinds of priorities and planning goals which Newport Beach has already developed and sit at top of mind for residents and city officials alike. As already stated on the City's website, these include:

- Reducing traffic citywide by 28,920 trips each day over the life of the plan
- Reducing potential new commercial, office, and industrial space by 1.45 million square feet
- Supporting efforts to acquire Banning Ranch for permanent open space
- Creating and implementing a long term strategy to control John Wayne Airport impacts
- Taking strong action to prevent or reduce water pollution in the bay and ocean
- Enhancing natural resources such as Upper Newport Bay
- Improving circulation by synchronizing traffic lights and making road improvements that respect our community character
- Introduction Newport Beach General Plan 1-3
- Creating guidelines that preserve the charm and beauty of our residential neighborhoods
- Preserving public views of the ocean, harbor and bay
- Continuing to provide first-class service to seniors
- Continuing to offer education and recreation programs such as Junior Lifeguards
- Maintaining a world-class public library system with branches convenient to residents
- Promoting revitalization of older commercial areas like West Newport and Balboa Village
- Fostering artistic and cultural activities and venues in the community

Task start: Upo. co. tract award

Task completio. : Early July 2019

2

Familiarize with state requirements for General Plans

Including new requirements, as of 2017, for sections on: Environmental Justice, Healthy Communities, Equitable and Resilient Communities, Economic Development, and Climate Change. Also calls for an Infill Compendium and a Renewable Energy Compendium.

Our firm includes a former Assembly Speaker Chief of Staff, a former Orange County Mayor, and an office in Sacramento just blocks from the Capitol. We are uniquely qualified to address the current Legislative requirements and keep one eye out past the horizon to watch for any changes Gov. Newsom might impose on future General Plans.

Task start: Upo. co. tract award

Task completio. : O. goi. g

3

Attend all Steering Committee meetings

Our goal wouldn't be merely attending such meetings, but to assist the Committee in making the most out of each meeting and maximizing the Committee's investment of time and resources. We would use our experience in orchestrating meetings designed to solicit community input to make these meetings more than just formalities and aim to work with the Committee to both maximize their utility and harvest useful participant and attendee feedback.

Task start: July 2019

Task completio. : 2023

Methodology (cont.)

4

Development of Outreach Program

We will design an inclusive process that solicits input from every corner of Newport Beach. Vision Meetings will bring out the regulars. We have extensive experience in using the internet and social media to broaden reach beyond just local insiders. We have relationships with stakeholders across the ideological spectrum that'll help get a true sense of the full community's opinion. We have handled input processes on a countywide basis for projects like Measure M. We feel we can bring significant expertise to this process, combining our creative and strategic sides into developing a modern plan that'll allow for everyone's input. In a city as unique and special as Newport Beach, that means a specialized kind of outreach program, and the one we design will reflect that reality.

Task start: Upo. co. tract award

Task completio. : Late July 2019

5

Maintenance of Online Presence

In a city as full of busy, but digitally connected people, it is imperative that this process include a state of the art web presence, including mobile accessibility. This process shouldn't be confined to just those City Hall fixtures and other individuals who have a dozen hours to attend a potentially raucous and wide ranging Steering Committee meeting. The opinion of the busy but civic minded thirty-something husband and wife with two young kids is just as important. The goal is to build tools that allow the casual observer to understand the choices at-hand and offer them easy opportunities to have their voices heard.

Task start: Upo. co. tract award

Task completio. : O. goi. g

6

User Friendly Educational Materials

Making the complicated simple isn't easy, especially with something as complex as a General Plan. Our internal creative team is capable of over-performing their expectations, in just about any medium imaginable. From print, to posters, to web, to digital advertising, to HD video, and even 3D animations, we have the ability to produce the full gamut of quality materials this project may call for.

Task start: July 2019

Task completio. : O. goi. g

7

Visioning Workshops

Newport Beach is comprised of 7 Council Districts, sure. But unlike some cities that break into Council Districts to fend off legal threats, Newport has very real differences in each of their communities. Sea level rise is a real issue in District 1. District 5 has unique concerns about development around Fashion Island. Traffic may be an issue throughout, but each District is really a community unto itself. We will seek to shape the scope of each of the visioning workshops to meet the real needs of each of Newport's communities.

Task start: July 2019

Task completio. : March 2020

8

Individual Stakeholder Meetings

There are some obvious major stakeholders in this process: major landowners/developers, public utilities, the Chamber of Commerce, and environmental groups. Then there are some less obvious ones; folks who care about the Marina, past Councilmembers who stay involved, folks who care about airport noise, civic and volunteer leaders. We have some strong and unique relationships in Newport Beach that will allow us to do this more fully and constructively than probably anyone else.

Task start: July 2019

Task completio. : March 2020

Methodology (cont.)

9

Innovating Active Community Participation

Technology has opened doors to connecting with the public that wouldn't have been possible until recently. Our goal will be to find ways to educate and solicit input from those who don't engage beyond being a smartphone activist. Through a state of the art website with mobile functionality and a heavy push of Facebook advertising to gather users there, we will broaden the reach of opinions sought.

Task start: July 2019

Task completio. : O. goi. g

10

Digital Engagement

Depending on what the Steering Committee is exactly looking for, we could take this in a number of different directions. Incorporating a video component to a tele-town hall would give us the ability to let our Committee leaders carry some of the heavy lifting in educating the public in such forums.

Task start: July 2019

Task completio. : O. goi. g

11

Desired Changes to Vision Statement

Our job in this isn't to drive the policy process. It is to solicit, process, and report back on community sentiment. We will push out a number of ways to do this. We will probably additionally poll and focus group ideas, to separate those ideas of an activated minority and bounce them against the will of the public at-large. We will leave the Committee with an accurate assessment of where the community in Newport Beach really stands on any and all of the proposed changes to the General Plan.

Task start: July 2019

Task completio. : March 2020

12

Record of All Voices and Thoughts Expressed

We will report back to the Committee with a multimedia report, offering them the ability to really understand and feel all of the input we've received. An impassioned speech at a Vision Meeting and the results of our SwipeLeft/SwipeRight app can't both be reduced to numbers on a page. We will help the Committee have a real understanding of what their community is telling them.

Task start: July 2019

Task completio. : O. goi. g

13

Online Portal Maintained Throughout the Project

This site will be created and updated constantly throughout the process. We will build custom tools for this project that allow for community members to easily access and understand the choices before them. This also won't just be a single source. We will also make sure the process has a Facebook and Twitter presence, has an email newsletter, and has digital advertising complementing the other efforts.

Task start: Upo. co. tract award

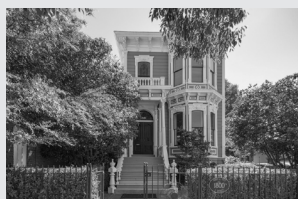
Task completio. : O. goi. g

Experience & Firm Profile

FSB Public Affairs, Inc. is a wholly-owned subsidiary of FSB Core Strategies, Inc. and it has been developing and implementing successful public relations and public affairs campaigns, providing strategic counsel and managing ballot initiative campaigns for clients since 2005, and through predecessor companies since 2001.

What that means for the City of Newport Beach is we provide you with a team of experts who are well versed in public outreach, community engagement and public participation — particularly on complex public policy and governance matters and land use projects.

Strategic and Tactical Excellence That Delivers Results.



SACRAMENTO OFFICE



ANAHEIM OFFICE

FLINT | SPRIGGS | BABB

FSB
core strategies

FLINT • SPRIGGS • BABB
F S B PUBLIC AFFAIRS

As a corporation with offices in Sacramento and Anaheim that also holds a Small Business Certification with California's Department of General Services (#58995), the firm is consistently ranked among the top five public relations firms in Sacramento by the Sacramento Business Journal, (#5 in 2018), and the top 25 in Orange County. With a current team of 22 professionals, 11 in Sacramento and 11 in Orange County, we are proud to be recognized for our award-winning work in strategic public affairs, grassroots outreach, public and media

relations, and multi-cultural outreach. Our principals and staff are among the most widely respected public relations, public affairs and political professionals in California. We have the scale to provide the support the City of Newport Beach requires, the experience in public outreach you need to meet your objectives, and the skills that will help position you to be successful.

The firm's financial condition is sound, and we do not foresee any contingencies that would impact our ability to complete this work.

Experience & Firm Profile

As a team of full-service communications and research firms, our combined capabilities include:

- **Message Development/Research**
- **Stakeholder, Community and Key Influencer Outreach**
- **Print and Digital Communications/Social Media**
- **Multi-cultural Outreach**
- **Media Relations and Training**
- **Event Planning**
- **Advertising Production & Placement**
- **Issue Management**
- **Crisis Communications**
- **Coalition/Ally Development**
- **Grassroots Activation**
- **Policy Research**
- **Public Opinion Research/Polling**
- **Strategic Counsel**
- **Government Relations**



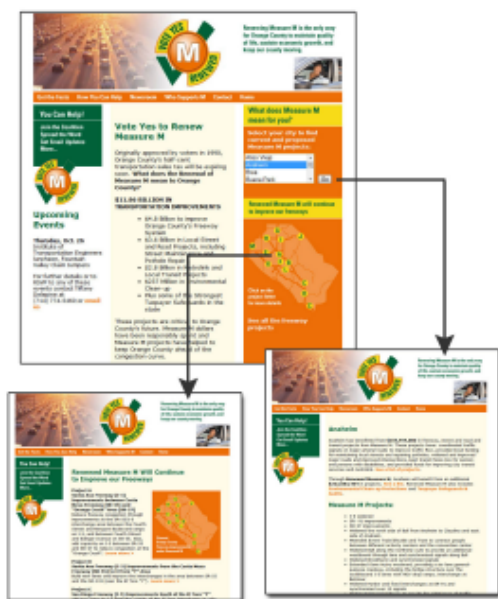
FLINT • SPRIGGS • SARR

F S B PUBLIC AFFAIRS

Case Study 1

By 2005, Orange County's Measure M, a local 1/2 cent local sales tax to fund transportation projects, was nearing the end of its authorized 20-year life. It was FSB's responsibility to help develop the Measure M Renewal Plan and design and manage a public education campaign that ultimately resulted in the plan being placed on the ballot. The project entailed public opinion research (including surveys and focus groups), earned media, coalition development, paid media and grassroots components on behalf of the Orange County Transportation Authority (OCTA).

Broad support was critical to the success of the effort. The Measure M Renewal Plan effort led by FSB represented nearly two years of collaborative efforts by the OCTA Board, the 20/20 and Citizen's Oversight Committees, the private sector and the Orange County community at large. The process of developing the plan involved scientific research on public opinion, amplified by massive public participation among opinion leaders, stakeholders, elected officials, transportation experts, and the public at large. This was matched against technical input from transportation planners and engineers and again against project by project cost estimates. Finally, a grid of projects was assembled and measured against both their political addition and subtraction to the effort and the efficacy in addressing transportation needs. Projects that were politically popular and addressed major transportation needs were slated for Measure M funding.



Once the Plan was developed, FSB moved into Phase II of the project, which entailed a comprehensive and aggressive public education component. In order for the Measure M Renewal Plan to go before voters, a majority of Orange County's individual city councils needed to vote to place it on the ballot. At the conclusion of this phase, FSB had garnered a list of all 34 cities and over 200 groups, companies, associations, unions, elected officials, environmental groups and community leaders that pledged their support for the Plan.

Notably, FSB set out to make it part of every business, elected, and community leader in the county's "civic duty" as a good citizen of Orange County to support Measure M. Ultimately, even elected officials who had made their careers off of the anti-tax movement were persuaded not to actively oppose Measure M.

Most critically, FSB made sure that the public at large knew three important facts about the Measure M Renewal Plan as it went to the ballot:

1. That OCTA had spent the original Measure M funds wisely and as promised, and could therefore be trusted to do so again.
2. That the Measure M Renewal Plan had real projects in it that specifically benefitted each and every commuter.
3. That the Renewal Plan contained strong safeguards and voter/taxpayer accountability measures so that they could be confident the funds would be spent again as promised.

It should be noted that after the Renewal Plan was placed on the ballot, FSB was retained by the private committee overseeing the advocacy election campaign for the ballot measure itself. FSB served as the lead strategists and managers for the campaign. Public opinion outreach, targeted direct mail, grassroots and coalition activation, earned media and an award-winning interactive website allowing voters to click anywhere on an Orange County map to see transportation improvement projects (freeways, surface streets, bike paths, pedestrian walkways) within their communities, were all tactics that were deployed by the campaign to reach Orange County voters. The task was daunting, as FSB faced a very conservative electorate in Orange County, a strong anti-tax climate and a souring mood of voters in the early days of the housing bust and recession. Despite this, FSB ran what was referred to as a "nearly flawless" campaign and Measure M was renewed by nearly 70 percent of Orange County voters. The campaign was later named by the Orange County Public Relations Society as the "Campaign of the Year" for 2006.

Case Study 2

Measure X was a challenging and unique campaign. Newport Beach had already passed, Measure S in 2000, establishing the concept of “citizens right to vote” on any developments that needed a General Plan amendment. However, X went one step further, requiring public votes on most developments of any consequence.

Communities like Newport Beach are typically inclined to vote in favor of these types of measures.

In order to defeat Measure X, therefore, the campaign needed to establish that Measure X was full of flaws that made it wrong for Newport Beach. In fact, we settled on a slogan that Measure X was “Just Too Flawed for Newport Beach.”

In the context of this campaign, we knew we had to transcend the core argument about property rights, because that was not sufficient to win. Instead, we wanted voters to know that, no matter what side that debate you were on, Measure X wasn't the answer due to its severely flawed provisions.

We identified several flaws that we then set out to repeatedly hammer home to the voters:

- Many single family residences, as many as 65% of Newport's residents, would be subject to the strict requirements envisioned for large projects
- The Newport Coast was exempt.
- Hospitals were exempt, while the medical offices across the street were not.
- Aside from being haphazardly applied, Measure X threatened to open a bevy of lawsuits and elections that would have potentially cost Newport Beach taxpayers hundreds of thousands of dollars. Measure X was so erroneously drafted that someone wanting to add something as simple as a room addition to their home could have had their project subjected to a citywide vote!
- The author made sure to exempt his own property.

The campaign received a huge boost when, at a city council hearing on the Measure, the author admitted when confronted with these flaws, that he had made “oversights” in the drafting, an omission that we would ram home repeatedly to the voters.

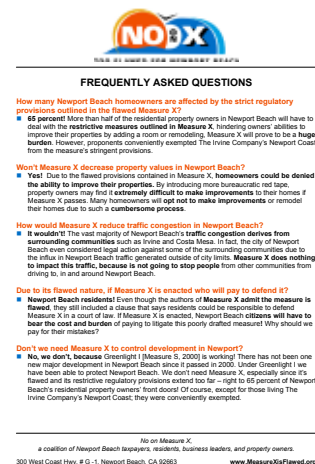
Working together with No on Measure X financial contributors and coalition members, Schubert Flint Public Affairs was able to devise a solid, winning campaign strategy, focusing on its many flaws, ensuring Measure X was defeated at the ballot box on Election Day.

The No on Measure X campaign strategy was heavily focused on Direct Mail and Fundraising, but was also comprised of Earned Media, Coalition, Slate Mail, Outreach, Paid Media, Automated Phone Calls, and Yes on Measure X monitoring. Each component was extremely crucial to achieve the overall result, defeating Measure X.

The Orange County Office of the Registrar certified the election on December 6, 2006 with an end result of 18,649 (63.3 percent) No votes and 10,820 (36.7 percent) Yes votes.



- Measure X is a flawed measure.**
- According to the Daily Pilot on July 12 and July 17, 2006, and in testimony at the City Council meeting on July 11, 2006, even Measure X proponents admitted the measure was flawed, calling their mistakes “oversights.” However when drafting the measure, the proponents ensured residential dwellings in The Irvine Company's Newport Coast were exempt from its stringent regulations.
- Measure X affects 65 percent of Newport Beach's residential property owners.**
- If this flawed Measure is enacted, 65 percent of the city's single-family and two-family residential properties will be subject to the measure's restrictive provisions. Under Measure X, something as simple as a room addition or kitchen remodel potentially would have to go to a public vote. However, those living in The Irvine Company's Newport Coast are completely exempt!
- We don't need Measure X.**
- Newport Beach already passed Measure S (Greenlight) in 2000, giving us control over major developments. Since Measure S, which was narrowly tailored to focus only on major developments, passed no new major development in Newport has been approved. Since Greenlight I is working, it is unnecessary to take chances adopting a flawed, more stringent version of Greenlight I that applies to more than half of all residential property owners in the City. We don't need Measure X.
- Measure X won't alleviate traffic problems.**
- Measure X doesn't do a thing to reduce traffic congestion. Most traffic originates from outside of Newport Beach as a result of events and high-rise condominiums, new homes and office buildings in neighboring cities. In fact, the City of Newport Beach has even considered legal action against surrounding cities due to the present and impending traffic problems. People drive to and through Newport Beach to take advantage of our unique shopping, one-of-a-kind restaurants and beautiful beaches. Measure X will not be able to regulate those living in surrounding cities.
- Measure X does not increase property values.**
- Measure X does not help to increase property values as proponents claim. If anything,



Case Study 3

Placer County Transportation Planning Agency

The Placer County Transportation Planning Agency, which hired FSB to establish the foundational groundwork for a potential transportation sales tax measure in 2016. Like many other counties across the state, Placer was not immune to a crippling shortage in transportation funding.

FSB worked in lockstep with PCTPA leadership to develop and implement a multi-phase communications, outreach and education program aimed at key county elected officials and business leaders that discussed local transportation infrastructure accomplishments, projected county population growth, developed and presented an expenditure plan to meet future transportation needs, and made the case for local funding and management. FSB developed and managed the communication and education phases of the program, eventually leading to placement of a funding measure on the local ballot.

KEEP PLACER MOVING

Placer County Transportation Planning Agency
200 Nevada Street | Auburn, CA 95603

KEEP PLACER MOVING

Accountable. Efficient. Effective.
Your Placer County Transportation Planning Agency

"A model public agency. PCTPA has delivered transportation projects on time and on budget — ensuring our tax dollars are spent wisely." — KSXN23

Protect your quality of life. Learn about the draft plan to maintain and improve Placer County's transportation infrastructure.



PCTPA's nine board members are comprised of local elected officials and one member of the public who provide balanced representation for all citizens of Placer County.

More than 95% of the current funds controlled by PCTPA are used directly on transportation projects. The agency manages the entire regional transportation system with only 7 full-time employees. There is virtually no overhead.

PCTPA has leveraged existing, limited resources to attract matching funds to complete these successful projects...

- ✓ Using the 40 benchmark
- ✓ Building the 65 Lincoln Express
- ✓ Updating 40/50/60/70/80/90/100/110/120/130/140/150/160/170/180/190/200/210/220/230/240/250/260/270/280/290/300/310/320/330/340/350/360/370/380/390/400/410/420/430/440/450/460/470/480/490/500/510/520/530/540/550/560/570/580/590/600/610/620/630/640/650/660/670/680/690/700/710/720/730/740/750/760/770/780/790/800/810/820/830/840/850/860/870/880/890/900/910/920/930/940/950/960/970/980/990/1000/1010/1020/1030/1040/1050/1060/1070/1080/1090/1100/1110/1120/1130/1140/1150/1160/1170/1180/1190/1200/1210/1220/1230/1240/1250/1260/1270/1280/1290/1300/1310/1320/1330/1340/1350/1360/1370/1380/1390/1400/1410/1420/1430/1440/1450/1460/1470/1480/1490/1500/1510/1520/1530/1540/1550/1560/1570/1580/1590/1600/1610/1620/1630/1640/1650/1660/1670/1680/1690/1700/1710/1720/1730/1740/1750/1760/1770/1780/1790/1800/1810/1820/1830/1840/1850/1860/1870/1880/1890/1900/1910/1920/1930/1940/1950/1960/1970/1980/1990/2000/2010/2020/2030/2040/2050/2060/2070/2080/2090/2100/2110/2120/2130/2140/2150/2160/2170/2180/2190/2200/2210/2220/2230/2240/2250/2260/2270/2280/2290/2300/2310/2320/2330/2340/2350/2360/2370/2380/2390/2400/2410/2420/2430/2440/2450/2460/2470/2480/2490/2500/2510/2520/2530/2540/2550/2560/2570/2580/2590/2600/2610/2620/2630/2640/2650/2660/2670/2680/2690/2700/2710/2720/2730/2740/2750/2760/2770/2780/2790/2800/2810/2820/2830/2840/2850/2860/2870/2880/2890/2900/2910/2920/2930/2940/2950/2960/2970/2980/2990/3000/3010/3020/3030/3040/3050/3060/3070/3080/3090/3100/3110/3120/3130/3140/3150/3160/3170/3180/3190/3200/3210/3220/3230/3240/3250/3260/3270/3280/3290/3300/3310/3320/3330/3340/3350/3360/3370/3380/3390/3400/3410/3420/3430/3440/3450/3460/3470/3480/3490/3500/3510/3520/3530/3540/3550/3560/3570/3580/3590/3600/3610/3620/3630/3640/3650/3660/3670/3680/3690/3700/3710/3720/3730/3740/3750/3760/3770/3780/3790/3800/3810/3820/3830/3840/3850/3860/3870/3880/3890/3900/3910/3920/3930/3940/3950/3960/3970/3980/3990/4000/4010/4020/4030/4040/4050/4060/4070/4080/4090/4100/4110/4120/4130/4140/4150/4160/4170/4180/4190/4200/4210/4220/4230/4240/4250/4260/4270/4280/4290/4300/4310/4320/4330/4340/4350/4360/4370/4380/4390/4400/4410/4420/4430/4440/4450/4460/4470/4480/4490/4500/4510/4520/4530/4540/4550/4560/4570/4580/4590/4600/4610/4620/4630/4640/4650/4660/4670/4680/4690/4700/4710/4720/4730/4740/4750/4760/4770/4780/4790/4800/4810/4820/4830/4840/4850/4860/4870/4880/4890/4900/4910/4920/4930/4940/4950/4960/4970/4980/4990/5000/5010/5020/5030/5040/5050/5060/5070/5080/5090/5100/5110/5120/5130/5140/5150/5160/5170/5180/5190/5200/5210/5220/5230/5240/5250/5260/5270/5280/5290/5300/5310/5320/5330/5340/5350/5360/5370/5380/5390/5400/5410/5420/5430/5440/5450/5460/5470/5480/5490/5500/5510/5520/5530/5540/5550/5560/5570/5580/5590/5600/5610/5620/5630/5640/5650/5660/5670/5680/5690/5700/5710/5720/5730/5740/5750/5760/5770/5780/5790/5800/5810/5820/5830/5840/5850/5860/5870/5880/5890/5900/5910/5920/5930/5940/5950/5960/5970/5980/5990/6000/6010/6020/6030/6040/6050/6060/6070/6080/6090/6100/6110/6120/6130/6140/6150/6160/6170/6180/6190/6200/6210/6220/6230/6240/6250/6260/6270/6280/6290/6300/6310/6320/6330/6340/6350/6360/6370/6380/6390/6400/6410/6420/6430/6440/6450/6460/6470/6480/6490/6500/6510/6520/6530/6540/6550/6560/6570/6580/6590/6600/6610/6620/6630/6640/6650/6660/6670/6680/6690/6700/6710/6720/6730/6740/6750/6760/6770/6780/6790/6800/6810/6820/6830/6840/6850/6860/6870/6880/6890/6900/6910/6920/6930/6940/6950/6960/6970/6980/6990/7000/7010/7020/7030/7040/7050/7060/7070/7080/7090/7100/7110/7120/7130/7140/7150/7160/7170/7180/7190/7200/7210/7220/7230/7240/7250/7260/7270/7280/7290/7300/7310/7320/7330/7340/7350/7360/7370/7380/7390/7400/7410/7420/7430/7440/7450/7460/7470/7480/7490/7500/7510/7520/7530/7540/7550/7560/7570/7580/7590/7600/7610/7620/7630/7640/7650/7660/7670/7680/7690/7700/7710/7720/7730/7740/7750/7760/7770/7780/7790/7800/7810/7820/7830/7840/7850/7860/7870/7880/7890/7900/7910/7920/7930/7940/7950/7960/7970/7980/7990/8000/8010/8020/8030/8040/8050/8060/8070/8080/8090/8100/8110/8120/8130/8140/8150/8160/8170/8180/8190/8200/8210/8220/8230/8240/8250/8260/8270/8280/8290/8300/8310/8320/8330/8340/8350/8360/8370/8380/8390/8400/8410/8420/8430/8440/8450/8460/8470/8480/8490/8500/8510/8520/8530/8540/8550/8560/8570/8580/8590/8600/8610/8620/8630/8640/8650/8660/8670/8680/8690/8700/8710/8720/8730/8740/8750/8760/8770/8780/8790/8800/8810/8820/8830/8840/8850/8860/8870/8880/8890/8900/8910/8920/8930/8940/8950/8960/8970/8980/8990/9000/9010/9020/9030/9040/9050/9060/9070/9080/9090/9100/9110/9120/9130/9140/9150/9160/9170/9180/9190/9200/9210/9220/9230/9240/9250/9260/9270/9280/9290/9300/9310/9320/9330/9340/9350/9360/9370/9380/9390/9400/9410/9420/9430/9440/9450/9460/9470/9480/9490/9500/9510/9520/9530/9540/9550/9560/9570/9580/9590/9600/9610/9620/9630/9640/9650/9660/9670/9680/9690/9700/9710/9720/9730/9740/9750/9760/9770/9780/9790/9800/9810/9820/9830/9840/9850/9860/9870/9880/9890/9900/9910/9920/9930/9940/9950/9960/9970/9980/9990/10000/10010/10020/10030/10040/10050/10060/10070/10080/10090/10100/10110/10120/10130/10140/10150/10160/10170/10180/10190/10200/10210/10220/10230/10240/10250/10260/10270/10280/10290/10300/10310/10320/10330/10340/10350/10360/10370/10380/10390/10400/10410/10420/10430/10440/10450/10460/10470/10480/10490/10500/10510/10520/10530/10540/10550/10560/10570/10580/10590/10600/10610/10620/10630/10640/10650/10660/10670/10680/10690/10700/10710/10720/10730/10740/10750/10760/10770/10780/10790/10800/10810/10820/10830/10840/10850/10860/10870/10880/10890/10900/10910/10920/10930/10940/10950/10960/10970/10980/10990/11000/11010/11020/11030/11040/11050/11060/11070/11080/11090/11100/11110/11120/11130/11140/11150/11160/11170/11180/11190/11200/11210/11220/11230/11240/11250/11260/11270/11280/11290/11300/11310/11320/11330/11340/11350/11360/11370/11380/11390/11400/11410/11420/11430/11440/11450/11460/11470/11480/11490/11500/11510/11520/11530/11540/11550/11560/11570/11580/11590/11600/11610/11620/11630/11640/11650/11660/11670/11680/11690/11700/11710/11720/11730/11740/11750/11760/11770/11780/11790/11800/11810/11820/11830/11840/11850/11860/11870/11880/11890/11900/11910/11920/11930/11940/11950/11960/11970/11980/11990/12000/12010/12020/12030/12040/12050/12060/12070/12080/12090/12100/12110/12120/12130/12140/12150/12160/12170/12180/12190/12200/12210/12220/12230/12240/12250/12260/12270/12280/12290/12300/12310/12320/12330/12340/12350/12360/12370/12380/12390/12400/12410/12420/12430/12440/12450/12460/12470/12480/12490/12500/12510/12520/12530/12540/12550/12560/12570/12580/12590/12600/12610/12620/12630/12640/12650/12660/12670/12680/12690/12700/12710/12720/12730/12740/12750/12760/12770/12780/12790/12800/12810/12820/12830/12840/12850/12860/12870/12880/12890/12900/12910/12920/12930/12940/12950/12960/12970/12980/12990/13000/13010/13020/13030/13040/13050/13060/13070/13080/13090/13100/13110/13120/13130/13140/13150/13160/13170/13180/13190/13200/13210/13220/13230/13240/13250/13260/13270/13280/13290/13300/13310/13320/13330/13340/13350/13360/13370/13380/13390/13400/13410/13420/13430/13440/13450/13460/13470/13480/13490/13500/13510/13520/13530/13540/13550/13560/13570/13580/13590/13600/13610/13620/13630/13640/13650/13660/13670/13680/13690/13700/13710/13720/13730/13740/13750/13760/13770/13780/13790/13800/13810/13820/13830/13840/13850/13860/13870/13880/13890/13900/13910/13920/13930/13940/13950/13960/13970/13980/13990/14000/14010/14020/14030/14040/14050/14060/14070/14080/14090/14100/14110/14120/14130/14140/14150/14160/14170/14180/14190/14200/14210/14220/14230/14240/14250/14260/14270/14280/14290/14300/14310/14320/14330/14340/14350/14360/14370/14380/14390/14400/14410/14420/14430/14440/14450/14460/14470/14480/14490/14500/14510/14520/14530/14540/14550/14560/14570/14580/14590/14600/14610/14620/14630/14640/14650/14660/14670/14680/14690/14700/14710/14720/14730/14740/14750/14760/14770/14780/14790/14800/14810/14820/14830/14840/14850/14860/14870/14880/14890/14900/14910/14920/14930/14940/14950/14960/14970/14980/14990/15000/15010/15020/15030/15040/15050/15060/15070/15080/15090/15100/15110/15120/15130/15140/15150/15160/15170/15180/15190/15200/15210/15220/15230/15240/15250/15260/15270/15280/15290/15300/15310/15320/15330/15340/15350/15360/15370/15380/15390/15400/15410/15420/15430/15440/15450/15460/15470/15480/15490/15500/15510/15520/15530/15540/15550/15560/15570/15580/15590/15600/15610/15620/15630/15640/15650/15660/15670/15680/15690/15700/15710/15720/15730/15740/15750/15760/15770/15780/15790/15800/15810/15820/15830/15840/15850/15860/15870/15880/15890/15900/15910/15920/15930/15940/15950/15960/15970/15980/15990/16000/16010/16020/16030/16040/16050/16060/16070/16080/16090/16100/16110/16120/16130/16140/16150/16160/16170/16180/16190/16200/16210/16220/16230/16240/16250/16260/16270/16280/16290/16300/16310/16320/16330/16340/16350/16360/16370/16380/16390/16400/16410/16420/16430/16440/16450/16460/16470/16480/16490/16500/16510/16520/16530/16540/16550/16560/16570/16580/16590/16600/16610/16620/16630/16640/16650/16660/16670/16680/16690/16700/16710/16720/16730/16740/16750/16760/16770/16780/16790/16800/16810/16820/16830/16840/16850/16860/16870/16880/16890/16900/16910/16920/16930/16940/16950/16960/16970/16980/16990/17000/17010/17020/17030/17040/17050/17060/17070/17080/17090/17100/17110/17120/17130/17140/17150/17160/17170/17180/17190/17200/17210/17220/17230/17240/17250/17260/17270/17280/17290/17300/17310/17320/17330/17340/17350/17360/17370/17380/17390/17400/17410/17420/17430/17440/17450/17460/17470/17480/17490/17500/17510/17520/17530/17540/17550/17560/17570/17580/17590/17600/17610/17620/17630/17640/17650/17660/17670/17680/17690/17700/17710/17720/17730/17740/17750/17760/17770/17780/17790/17800/17810/17820/17830/17840/17850/17860/17870/17880/17890/17900/17910/17920/17930/17940/17950/17960/17970/17980/17990/18000/18010/18020/18030/18040/18050/18060/18070/18080/18090/18100/18110/18120/18130/18140/18150/18160/18170/18180/18190/18200/18210/18220/18230/18240/18250/18260/18270/18280/18290/18300/18310/18320/18330/18340/18350/18360/18370/18380/18390/18400/18410/18420/18430/18440/18450/18460/18470/18480/18490/18500/18510/18520/18530/18540/18550/18560/18570/18580/18590/18600/18610/18620/18630/18640/18650/18660/18670/18680/18690/18700/18710/18720/18730/18740/18750/18760/18770/18780/18790/18800/18810/18820/18830/18840/18850/18860/18870/18880/18890/18900/18910/18920/18930/18940/18950/18960/18970/18980/18990/19000/19010/19020/19030/19040/19050/19060/19070/19080/19090/19100/19110/19120/19130/19140/19150/19160/19170/19180/19190/19200/19210/19220/19230/19240/19250/19260/19270/19280/19290/19300/19310/19320/19330/19340/19350/19360/19370/19380/19390/19400/19410/19420/19430/19440/19450/19460/19470/19480/19490/19500/19510/19520/19530/19540/19550/19560/19570/19580/19590/19600/19610/19620/19630/19640/19650/19660/19670/19680/19690/19700/19710/19720/19730/19740/19750/19760/19770/19780/19790/19800/19810/19820/19830/19840/19850/19860/19870/19880/19890/19900/19910/19920/19930/19940/19950/19960/19970/19980/19990/20000/20010/20020/20030/20040/20050/20060/20070/20080/20090/20100/20110/20120/20130/20140/20150/20160/20170/20180/20190/20200/20210/20220/20230/20240/20250/20260/20270/20280/20290/20300/20310/20320/20330/20340/20350/20360/20370/20380/20390/20400/20410/20420/20430/20440/20450/20460/20470/20480/20490/20500/20510/20520/20530/20540/20550/20560/20570/20580/20590/20600/20610/20620/20630/20640/20650/20660/20670/20680/20690/20700/20710/20720/20730/20740/20750/20760/20770/20780/20790/20800/20810/20820/20830/20840/20850/20860/20870/20880/20890/20900/20910/20920/20930/20940/20950/20960/20970/20980/20990/21000/210

References

OCTA Measure M2 Renewal

Develop the Measure M Renewal Plan and design and manage a public education campaign that ultimately resulted in the plan being placed on the ballot.

Art Leahy – CEO, Southern California Regional Rail Authority (former CEO, OCTA)

One Gateway Plaza, 12th Floor

Los Angeles, CA 90012

Phone: 213-922-6000

Email: leahya@metro.net

City of Newport Beach Measure X

Design and implementation of public education and campaign against Measure X ballot measure to require public votes on most developments in the City.

Paul Hernandez – Senior Vice President of Corporate Affairs, The Irvine Company

550 Newport Center Drive

Newport Beach, CA 92669

Phone: 714- 287-7538

Email: phernandez@irvinecompany.com

PCTPA Public Outreach

Public outreach to establish the groundwork for a potential 2016 transportation sales tax measure.

Celia McAdam – CEO, Placer County Transportation Planning Agency

299 Nevada Street

Auburn, CA 95603

Phone: 916-206-4035

Email: cmcadam@pctpa.org

ATTACHMENT A: STATEMENT OF COMPLIANCE

Instructions: Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

No Exceptions. The undersigned declares that the Proposal submitted by (Name of Firm) FSB PUBLIC AFFAIRS, INC. to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.


Signature

4/20/19
Date

JERRY VILLO PARSONS & GENERAL COUNSEL
Printed Name and Title

Exceptions. By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) _____ has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

Signature

Date

Printed Name and Title

N/A

[Attach a separate sheet(s) detailing each exception being taken]

ATTACHMENT B: PROPOSER INFORMATION FORM

Instructions: Complete the form below and remit as part of your Proposal as Attachment B.

CONSULTANT INFORMATION

CONSULTANT/FIRM NAME: FSB Public Affairs, Inc.

ADDRESS FOR NOTICES: 2099 S State College Blvd, Suite 630
Anaheim, CA 92806

MAIN CONTACT (NAME AND TITLE): Jerry Amante, Senior Vice President

CONTACT NUMBERS: TELEPHONE: (949) 336-4600 FAX: _____

E-MAIL ADDRESS: Jamante@fsbcorestrategies.com

FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

1. CONSULTANT AUTHORIZED SIGNATORY(IES):

SIGNATURE

PRINT NAME

TITLE

DATE

SIGNATURE

PRINT NAME

TITLE

DATE

2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:☐ Proposer's Bylaws/ Operating Agreement

Section _____

☐ Copy Attached☐ Board Resolution☐ Copy Attached☒ Corporations or Business and Professions Code**

**If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

IMPORTANT NOTE: If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:

PART 1: TECHNICAL PROPOSAL SECTION

SECTION A: PROPOSER BACKGROUND



COVER LETTER

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bind the Proposer to contractual obligations.



ORGANIZATIONAL STRUCTURE

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

SECTION B: METHODOLOGY



PROPOSAL – METHODOLOGY

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.



ANTICIPATED WORK SCHEDULE

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

SECTION C: PROPOSER EXPERIENCE



MINIMUM REQUIREMENT: EXPERIENCE

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.

☒ **REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

SECTION D: PROPOSAL ATTACHMENTS

☒ **ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

☒ **ATTACHMENT B: PROPOSER INFORMATION FORM**

☒ **ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST**

☒ **OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

PART 2: COMPENSATION PROPOSAL SECTION

☒ **COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

SUBMISSION INSTRUCTIONS

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov


(This page left intentionally blank.)

The background of the slide features a photograph of a residential scene at dusk. On the left, a tall palm tree stands against a darkening sky. In the center and right, a house with a green-painted upper level and a white lower level is visible. The house has a balcony with a white railing and red outdoor furniture. A blue and yellow 'P' parking sign is visible on the right side of the house. The overall lighting is soft, with some interior lights of the house glowing.

APRIL 26, 2019

COMMUNITY ENGAGEMENT PROPOSAL

RELATED TO A FUTURE GENERAL PLAN UPDATE

KEARNS  WEST

270 BAKER ST E, STE 200 - COSTA MESA, CA 92626

www.kearnswest.com

April 26, 2019

Anthony Nguyen
Contract Administrator
City of Newport Beach
anguyen@newportbeachca.gov

Re: RFP #19-69 – Community Engagement Related to a Future General Plan Update

Dear Mr. Nguyen:

Congratulations to the City of Newport Beach and its community leaders for embarking on an exceptional path for a future General Plan Update! The City's "Listen & Learn" process has the promise of establishing a community-based, cohesive vision as the foundation and primary driver for plan formulation. Your community members will have a real, meaningful role in shaping and forming the next chapter in the City's history. And Kearns & West is eager and distinctively qualified to serve as your partner in optimizing Listen & Learn, as demonstrated in the enclosed proposal.

Project Understanding

The City intends to conduct an update of the current General Plan, dated 2006. However, the first step will consist of a Listen & Learn process for community members to explore the 2006 vision statement, goal, and policy framework, and assess needed changes to reflect current aspirations, needs, and opportunities. The re-energized vision framework will then guide a future General Plan update, creating a direct link between shared community values and the step-by-step planning process. Incorporating perspectives of all Newport Beach communities in Listen & Learn is a priority, with the City placing significant value on residents' perspectives but also valuing the viewpoints of other community stakeholders.

Importantly, Listen & Learn isn't just about soliciting input. At its core, Listen & Learn involves bringing together people who may have varying perspectives, facilitating dialogue to uncover shared values, and helping community members translate those values into the building blocks for the future General Plan update.

The Team

After carefully considering the City's goals for Listen & Learn -- and considering our experience serving cities across Southern California and beyond on comprehensive planning projects -- we assembled a stellar team to meet your needs. Kearns & West is the prime consultant, bringing extensive experience conducting community engagement for general plans and other types of local and regional plans, almost exclusively working for government agencies. **Kearns & West** is rock solid, having been in business for 35 years consulting solely in public involvement, stakeholder facilitation, and strategic communication services. Jenna Tourje will serve as project manager. She is local to Orange County (and right next door in Costa Mesa!) and has experience leading outreach for general plans and other citywide engagement efforts in Southern California. We are joined by **Dyett & Bhatia**, an equally established firm with unparalleled credentials in assisting cities with general plan updates and visioning.

Strategic Communications and Collaboration

Los Angeles, CA Portland, OR Riverside, CA Sacramento, CA San Diego, CA San Francisco, CA Washington, DC

Digital engagement will significantly expand the number and diversity of Newport Beach community members involvement in Listen & Learn. We have used many online engagement tools, and **EngagementHQ** is the most effective platform for effective online input that informs plan-making. Because graphic communication can create energy and “buzz” that enhances community engagement levels, we included Newport Beach-based **Common Thread Collective** to work with our community engagement experts on a customized graphic identity and tag lines.

What Sets the Kearns & West Team Apart

Here's what Newport Beach can count on from the Kearns & West team:

- Insight into the transformative opportunity for community engagement offered by general plan updates, from our team's decades of experience with general plans for local municipal governments across Southern California.
- Results-oriented community engagement expertise, integrating traditional methods and innovation, paying attention to involving the full cross-section of perspectives and stakeholders, and using a framework of building relationships, trust, and understanding.
- Proven skill in conducting city-wide community engagement programs, for general plan updates and other types of city-wide plans (including “pre-general plan update” vision exploration, similar to Newport Beach's approach).
- Appreciation of the unique needs of conducting public involvement programs for urban and environmental planning programs in coastal cities, from our experience in cities like Laguna Beach, Malibu, and Carlsbad,
- Local project manager, five minutes away from Newport Beach City Hall, balancing Newport Beach understanding and familiarity with the benefit of an outsider's neutrality.

In Sum

On behalf of the Kearns & West team, thank you for this opportunity to serve the City of Newport Beach and your communities, and we eagerly await the selection decision. Should you need any additional information or have questions, you can reach me directly at (619) 966-8077 and jisaacson@kearnswest.com

Warm regards,



Joan Isaacson
Principal

Strategic Communications and Collaboration
Los Angeles, CA Portland, OR Riverside, CA Sacramento, CA San Diego, CA San Francisco, CA Washington, DC

SECTION A

PROPOSER BACKGROUND



MEET OUR TEAM

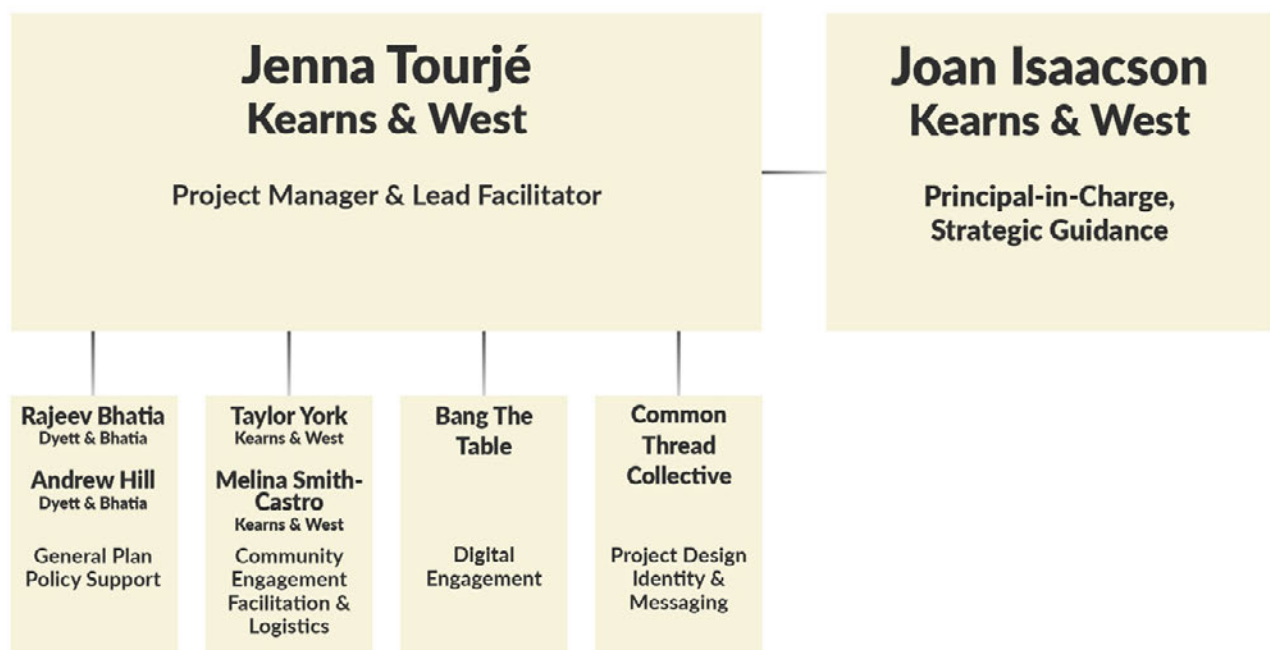


The General Plan Steering Committee, with the City, put incredible thought and care into crafting the Listen and Learn scope of work. In turn, Kearns & West studied the work program and conducted background research in order to assemble an exceptional team for accomplishing the Listen and Learn intent and goals.

As highlighted in the cover letter, the Kearns & West team understands the transformative opportunity from citywide engagement on vision, values, goals, and needs. We have experienced this first-hand during our involvement on scores of general plan updates and other kinds of citywide planning projects. Our team also brings the deep experience working for local government agencies identified in the RFP, and has proven experience conducting community engagement grounded in customized strategies. Successfully involving the full range of voices and perspective is central, using techniques that intersect people in ways that feel convenient and meaningful. And fun too!

The following paragraphs describe team composition and roles. Next is the requested matrix summarizing team member, job classification, and hours by task, which is followed by team member resumes.

ORGANIZATIONAL STRUCTURE



KEARNS & WEST - LEAD

Firm Introduction

People have an intrinsic desire to connect to community – we're hardwired for it. Connections are made through friendships with neighbors, commitment to organizations, support of local businesses, and shared celebrations of local pride. Cities that foster strong community connection are valued; they are the cities where people seek to live, and businesses flourish.

Local government has a unique role to play in cultivating community connection. It can create forums where people can express their thoughts and values, and have them heard and considered by others. By actively engaging residents, business owners, and other stakeholders, local government can create a more desirable place to live and reap the benefits of having constituents who are more informed, understand local government's needs and goals, trust that their city officials will seek their input on important decisions, and have confidence that local decision-making is responsive and transparent.

Kearns & West, in business for 35 years, helps local government to connect with their communities. We partner with municipal leaders and stakeholders to formulate strategies for both citywide community engagement and specific projects. Cities rely on us to help them establish more effective communication channels, create proactive processes for identifying and resolving issues and concerns, and ensure public involvement has a place in shaping the future. In fact, we focus exclusively on this type of work, almost entirely for government agencies from the federal to local level. Our nearly 50 staff work in teams located in Southern California, San Francisco, Sacramento, Portland OR, Atlanta GA, and Washington DC.

Regardless of whether we're working at the citywide level or project level, we always start by clearly identifying objectives for engagement. We conduct research to understand local community characteristics, communication opportunities and challenges, and potential for community growth and change – all with the ultimate goal of understanding what makes a place tick. Next, we develop a customized engagement strategy that builds on the objectives and what we've learned, including tried-and-true methods and new ideas that surfaced through our research that are sensitive to local needs and culture.

Our outreach programs typically integrate a range of online engagement, in-person activities, formal meetings, less structured interactions, and topic-driven outreach and activities designed purely to build relationships and connection. And fun – fun is always an important element! At the heart of our work is elevating people-to-people and people-to-place connections that makes make communities better.

Importantly for the Newport Beach Listen and Learn project, the Kearns & West team in Southern California has specialized expertise conducting community engagement for general plan updates and other types of citywide planning projects. San Diego, San Clemente, Imperial Beach, Encinitas, Venice, and Pacific Palisades.

We are valued for our ability to synchronize multi-pronged community engagement programs with the incremental steps for plan making – visioning, issues

KEARNS & WEST SERVICE PLATFORM

- **Citywide community engagement strategies**
- **Public involvement plan preparation and implementation**
- **Stakeholder engagement and communications**
- **Digital platforms for engagement and contact management**
- **Committee and work group process facilitation**
- **Public meeting facilitation and planning**
- **CEQA/NEPA scoping and public review management**
- **Online engagement and content**
- **Mediation and alternative dispute resolution**
- **Messaging and talking points**
- **Informational materials development**
- **Media relations and social media outreach**
- **Issue tracking and response plans**
- **Graphic design and production**
- **Environmental justice communities engagement plans**
- **Multi-language translation and interpretation**

and opportunities assessment, alternatives, draft planning concepts, environmental review, and the approval process. The Southern California team also brings insight into the unique considerations for conducting community engagement in coastal communities, having experience in Laguna Beach, Malibu, Carlsbad, Coronado, San Diego, San Clemente, Imperial Beach, Encinitas, Venice, and Pacific Palisades.

Role for Newport Beach Listen and Learn

As the prime consultant, Kearns & West will be involved all facets of Listen and Learn. Most tasks will be directly carried out by our team. For tasks undertaken by subconsultants, we will provide direction, strategy, schedule supervision, and quality control, ensuring that all subconsultant tasks are seamlessly integrated into the Listen and Learn process. We will also be the point of contact for the City and the Steering Committee.

Key Team Members



Jenna Tourjé, AICP, Director

Listen & Learn Role: Project Manager and Lead Facilitator

Jenna has over 10 years of experience in community engagement, stakeholder facilitation, and urban planning. She is passionate about partnering with communities on the path to creating healthy, whole and equitable places, where people love where they live and have a voice and a stake in the future. Her projects involve multi-pronged outreach techniques and scale outreach to engage even the hardest to reach community members. She has led and facilitated stakeholder and community engagement at the regional and local level related to General Plans, Specific Plans, transit-supportive development, active transportation, healthy communities, transportation planning, and parks and open space. As an Orange County native and resident of neighboring Costa Mesa, Jenna is knowledgeable about what it takes to engage with residents in Newport Beach. She has facilitated community engagement for cities in Orange County and Southern California, including the County of Orange, Laguna Beach, and Malibu. She was a board member and Executive Director for Mika CDC, a non-profit on the border of Costa Mesa and Newport Beach. Jenna is certified by the International Association of Public Participation (IAP2) and co-instructs the Graduate Planning Practicum for the Masters of Urban Planning and Public Policy department at UC Irvine.



Joan Isaacson, Principal

Listen & Learn Role: Principal-in-Charge, Engagement Strategy, Quality Control, Facilitation

Joan has 25-plus years of experience consulting in public involvement and community planning in Southern California. As Principal at Kearns & West, she leads the Southern California team, which supports community engagement and stakeholder facilitation for municipal and regional governments on general and community plans, and plans addressing sea level rise and resiliency, complete streets, parks, open space resources, energy efficiency and renewables, and water. In her early consulting years, she managed and wrote general plans, giving her valued insight on integrating public involvement into planning processes, where input meaningfully informs visioning and plan development.



Taylor York, Senior Associate

Listen & Learn Role: Research, Digital & Graphic Engagement, and Facilitation & Event Support

Taylor's experience includes key roles in workshops, online engagement, graphic design and materials, and logistics planning for citywide general/community plans, transportation, sustainability, and environmental plans in Orange, Los Angeles, Riverside, and San Diego counties. He has 10 years experience in public and stakeholder engagement, enhanced by his planning degree from Cal Poly University, Pomona.



Melina Smith-Castro, Project Coordinator

Listen & Learn Role: Research, Event Planning and Logistics, Facilitation and Event Support

Melina is one of our rising stars, having made Kearns & West home after completing her planning degree at Cal Poly University, San Luis Obispo. She grew up and interned in San Clemente, knows the Orange County coastal communities, and has been involved in both community engagement plan preparation, event planning and logistics, input summary preparation, and workshop facilitation.

DYETT & BHATIA - SUBCONSULTANT

Firm Introduction

Dyett & Bhatia is uniquely focused on urban planning, with expertise in general plans, specific plans, zoning, environmental review, GIS, and graphic design, almost exclusively working for local municipalities. Maintaining a consistent staff size of approximately 22 over the past decade enables Dyett & Bhatia to offer deep expertise combined with personal attention of firm partners to all assignments. They are a California corporation based in Oakland, operating for the past 40 years. Plan making is approached by Dyett & Bhatia as a collaborative effort involving a diversity of stakeholders and are deeply committed to active community participation in the planning process.

Exceptional general plans are Dyett & Bhatia's trademark. They have prepared general plans for more than 60 cities and counties throughout California, and remain engaged at the forefront of contemporary concerns — planning for climate change and sustainability, linking land use and transportation, and shaping healthy and livable communities. Their current work in Southern California includes the Mission Valley and University Community Plans in San Diego and general plans in Carson and Diamond Bar in Los Angeles County. Recent work includes comprehensive general plan updates for Carlsbad and Redlands – both involving a two-phase process: visioning, followed by general plan updates – similar to the process for Newport Beach. Kearns & West Principal Joan Isaacson is a former Dyett & Bhatia team member, and played an instrumental role in the Redlands pre-General Plan Update visioning project.

Dyett & Bhatia has won 18 awards in the last five years alone from the American Planning Association—including two national awards (for sustainability and innovative outreach)—for the relatively small volume of work produced. Last year (2018) they won comprehensive planning awards from four APA sections of California, as well as a statewide comprehensive planning award for small jurisdictions (Belmont General Plan).

Role for Newport Beach Listen and Learn

Although Jenna and Joan from Kearns & West have extensive experience in both public involvement and preparing general plans, we added Dyett & Bhatia's exceptional general plan expertise to help us understand the unique components of Newport Beach's existing General Plan vision and policy framework. We also think it is important for them to weigh in on new general plan requirements that might benefit from consideration in Listen and Learn.

Key Team Members



Rajeev Bhatia, AICP, ASLA, Partner
Team Lead

Rajeev Bhatia is a planner and urban designer, and one of the most experienced preparers of general plans for California communities (more than 35 comprehensive general plans), having led these for some of the most distinctive cities statewide. He has extensive Southern California experience, including recently completed plans for San Diego and Carlsbad.



Andrew Hill, Associate Principal
Team Lead

Andrew Hill, Associate Principal: Andrew Hill is an award winning urban planner with expertise in land use, transit-oriented development, community engagement, and environmental review. He has led multi-disciplinary teams in preparing long range plans for communities throughout California, and he possesses over 15 years of project management and leadership experience in the fields of planning, construction management, and engineering.

COMMON THREAD COLLECTIVE - SUBCONSULTANT

Firm Introduction

In service of our clients, our focus on digital strategy, creative arsenal, and relationships uniquely aligns client dreams to our skill set driving revenue, growing brand awareness, and executing mission statements. We don't just sell stuff online, we invest in and help make our clients' dreams into reality.

CTC's branding department transforms visions into reality. This means conceiving, designing and implementing a consistent look and feel that reflects the mission and goals of clients. CTC specializes in providing businesses with the compelling design and persuasive messaging they need to take a great idea and get people on board with it. CTC has been proud to work with clients from diverse industries such as Born Primitive, VIZIO, Baden Sports, and Fielders Choice Goods.

Role for Newport Beach Listen and Learn

Common Thread Collective will lead the graphic identity and design for the Listen & Learn, providing a graphic identity manual and templated graphic materials.



Jonathan Dickson, Brand identity Designer
Team Lead

Jonathan Dickson is an experienced Designer with a demonstrated history of Design Thinking, Advertising and Brand Strategy. Having worked on a wide variety of projects in Tech, Apparel, Social Good, and local business, he is a versatile designer able to execute creative that is a perfect fit for the industry. Experience in print production, UXUI design, Environmental Design, Digital Advertising, and Logo Design, make Jonathan a seasoned creative that uses his experience to make the most out of brands at every touch point.

ENGAGEMENT HQ (BANG THE TABLE)

Firm Introduction

EngagementHQ (Bang the Table) is an online public engagement software that gets more people involved in your conversations. Through technology and deep industry knowledge, our aim is to continuously innovate and add value to the public participation industry. Our experience with online community engagement aims to empower organizations and their communities by providing them accessible opportunities to learn about and contribute to the decisions that affect their daily lives. Bang the Table was established because, no matter how well-designed the off-line consultation process, inevitably it only reaches a small segment of a community. The online space provides the opportunity to give vastly more people access to information and enable them to have their say. It drives inclusive, transparent, and measurable community engagement processes that empower collaborative learning, discussion, and debate. EngagementHQ is a community engagement platform that provides capacity and support for focused consultation in a safe, information-rich environment through an integrated range of online community engagement feedback tools. A diverse approach extends inclusiveness and gives the community better opportunities to have their say on issues that are important to them. The use of EngagementHQ, combined with our guidance and support, will provide an immediate and engaging online presence that will produce exceptional and measurable results.

Role for Newport Beach Listen and Learn

The Engagement HQ platform will be used to update the project website, host project information and timeline, facilitate online participation and engagement tools, and Vision Guide Portal.

EngagementHQ Tools Spectrum

Managing your project communications



Controlled environment

Participants cannot engage with each other. Data is stored in the back end and only accessible by admin.



Surveys

The Surveys tool gives people an opportunity to voice their opinion in a convenient and guided way, which has historically shown higher response rates than other formats.



Polls

Polls encourage people to give a quick answer on one question, selecting from multiple choice answers. They are able to instantly see the Poll results, piquing their interest and giving you real time insight.



Questions

Questions is an issues management and communications risk mitigation tool. It is a managed space for your community to ask you questions and for you to respond either publicly or privately.



Guestbook

Guestbook keeps things simple; people are only able to upload comments, which are moderated to manage what appears publicly. No other interaction is enabled.



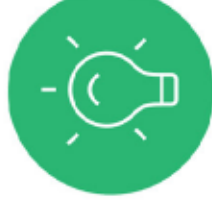
Stories

When we tell or hear a story, neuroscience tells us that we experience things on a higher and more resonant level. Stories helps your community better understand, empathize and relate to others as well as your project goals.



Places

Places is a simple way to gather community feedback and ideas directly on a map. Participants drop a "pin" in the area of concern, add photos and then fill in a quick survey.



Ideas

Ideas provides "virtual" post it notes for individuals to add their ideas to a collective board. People like the ideas that inspire them most, helping align your priorities with what matters most to the community.



Forum

The Forums tool creates a space for discussion, dialogue and debate. People share their experiences with others, ask questions and have conversations in a safe and interactive environment.

Open environment

Participants can engage with each other. Comments and ideas are visible.

Commenting
Disabled

Commenting
Enabled

Pre
Moderated

Post
Moderated

Answered
Privately

Answered
Publicly

MATRIX OF TOTAL WORK HOURS

		Jenna Tourje	Joan Isaacson	Taylor York	Melina Smith-Castro	Graphic Designer	Dyett & Bhatia	Common Thread Collective
		Director / Project Manager	Principal	Senior Associate	Project Coordinator	Graphic Designer	General Plan Lead	Brand Lead
1	Task 1: Consultant Familiarization With the General Plan							
1.1	Kick-off Meeting & Team Meetings	8	4	4	4		10	
1.2	Steering Committee Meetings	178	18		132		54	
1.3	General Plan Diagnostic	6	8				32	
2	Task 2: Community Engagement & Outreach Program							
	Program Development							
2.1	Outreach Program	15	4	20			8	
2.2	Graphic Identity	10	4					90
2.3	Educational Materials	20	4	40		35		
	Online Activation							
2.4	EngagementHQ	25	8	20				
2.5	Social Media & Email Campaigns	10	4		30	8		
	Community Dialogues							
2.6	Community-wide Launch	35	20	35	35	8	10	
2.7	Community Workshops	168	72	170	204	16	24	
2.8	Pop-up Outreach	90	16	100	50	8		
	Stakeholder Dialogues							
2.9	Stakeholder Dialogues	40			60			
2.10	Citywide Summit	65	8		80	8	14	
	Citywide Consensus							
2.11	City Summit	43	18	48	58	8		
3	Task 3: Capturing Community Desires							
3.1	Draft Vision Guide	30	15	30	5	10	30	
3.2	Final Vision Guide	20	7	20		40		
Total:		763	210	439	658	141	182	90



RESUMES

JENNA TOURJÉ

DIRECTOR & FACILITATOR



📍 Costa Mesa, CA

✉️ jtourje@kearnswest.com

☎️ 760.296.9355

EXPERTISE

- Community Engagement
- Facilitation
- Urban Planning

EDUCATION & CERTIFICATIONS

MURP, Urban and Regional Planning
University of California, Irvine

BA, International Relations
University of California, Irvine

American Institute of Certified Planners (AICP)
American Planning Association

Certificate, Public Participation
International Association of Public Participation (IAP2)

MEMBERSHIPS

American Planning Association, Orange County Chapter (OC-APA)

International Association of Public Participation (IAP2)

SUMMARY OF QUALIFICATIONS

Jenna Tourjé is a Director at Kearns & West with over 10 years of experience in community engagement, stakeholder facilitation, and urban planning. She is passionate about partnering with communities on the path to creating healthy, whole and equitable places, where people love where they live and have a voice and a stake in the future.

Through her experience as an outreach professional, urban planner, and educator, Jenna's unique expertise informs each one of her projects. Jenna loves place-based projects that connect neighbor to neighbor. Her projects involve multi-pronged outreach techniques and scale outreach to engage even the hardest to reach community members. She has led and facilitated stakeholder and community engagement at the regional and local level related to General Plans, Specific Plans, transit-supportive development, active transportation, healthy communities, transportation planning, and parks and open space.

As an Orange County native and resident of neighboring Costa Mesa, Jenna is knowledgeable about what it takes to engage with residents in Newport Beach. She has facilitated community engagement for cities in Orange County and Southern California, including the County of Orange, Laguna Beach, and Malibu. She was a board member and Executive Director for Mika CDC, a non-profit on the border of Costa Mesa and Newport Beach. Jenna is certified by the International Association of Public Participation (IAP2) and co-instructs the Graduate Planning Practicum for the Masters of Urban Planning and Public Policy department at UC Irvine.

RELEVANT EXPERIENCE

City of Rancho Santa Margarita, Comprehensive General Plan Update & EIR
Public Outreach Manager

Jenna led the outreach team for the Rancho Santa Margarita General Plan Update that engaged over 1000 residents. Residents were engaged through focus groups, roadshows, pop-up workshops, through extensive digital communication and website design. The focus of the update is to "refresh" the Land Use, Economic Development, Conservation/Open Space, Safety, and Noise elements to address the continued vision for the city. Additionally, updates will ensure that all elements are consistent with new state requirements for general plans.

City of San Jacinto, General Plan Update Outreach
Project Manager

Jenna leads the Kearns & West team in the outreach process for the Envision San Jacinto | General Plan 2040 update. Outreach for the project includes a digital engagement strategy, online surveys, visioning workshops, focus groups, stakeholder interviews, and pop-up events.

County of Orange, FIT Cities Initiative
Project Manager

Jenna led the FIT Cities Initiative for the Orange County Health Care Agency under a grant from Kaiser Permanente. She was responsible for engaging with 34 cities in Orange County and regional staff in local agencies to encourage

healthy community activities in cities throughout Orange County. Her role included providing planning service, technical assistance, training, and outreach to local city staff, elected/appointed officials, and residents to integrate obesity prevention strategies into local planning efforts.

County of Los Angeles, LA River Master Plan Update Steering Committee

Jenna is part of the facilitation team for the LA River Master Plan Update Steering Committee and Subcommittee process. The effort to update the LA River Master Plan was launched to modernize an existing 1996 plan, synthesize more recent ideas for portions of the LA River, and bring a coherent and comprehensive vision to the transformation and re-imagining of the LA River.

County of San Bernardino, Community Plans Continuum Project

Project Manager

As Group Project Manager, Jenna was responsible for managing six community plans in San Bernardino County as part of the larger community planning effort. As part of the countywide planning process, Jenna helped lead the development of community plans for 26 unincorporated communities. Communities range from the San Bernardino Mountains to the Mojave Desert. The project included intensive immersion weeks where multiple facilitations teams were immersed in each community conducting collaborative public workshops to engage communities to help develop goals, objectives, and action plans to address the issues and needs of each community.

City of Scottsdale, General Plan Outreach

Outreach Lead

Jenna led the development and preparation of outreach materials and assistance for the City of Scottsdale's General Plan Update. Her team served as the lead public involvement consultant providing public engagement guidance, graphic design, project messaging, and workshop strategy development assistance to the city's long-range planning staff. Specific work tasks included assisting in the development of public information material; coordination of land use design charrettes; development of strategy; facilitation of "World Café" workshop discussions; and development of self-guided workshop-in-a-box informational materials along with video montages, social media announcements, and project website content for public consumption.

City of Malibu, Malibu Bluffs Parkland Master Plan and EIR

Public Outreach Lead

Jenna coordinated the public outreach and engagement for the Malibu Bluffs Park Master Plan. Outreach for the project included interactive online engagement, a youth design charrette, visual preference surveys, and community meetings, engaging over 1000 residents in the park design. The project helped the City explore the potential of the Parkland to provide new recreational opportunities for the Malibu community to meet the city's current and future recreation needs.

City of Laguna Beach, Village Entrance Project

Outreach Manager

Jenna was responsible for coordinating the project communication and meetings as well as coordinating public outreach activities. Improvements are underway, and include additional landscaping, a pedestrian/bicycle pathway and an exterior renovation of the historic sewer digester facility.

City of Laguna Beach, Enhanced Mobility and Complete Streets Transition Plan

Planner

Jenna developed final plan and deliverables for the Enhancement Mobility and Complete Streets Transition Plan. The plan is designed to provide the policy framework for the city to implement physical and operational changes to the roadway network to improve conditions for all users including bicycles, pedestrians, transit, and motor vehicles. Extensive community outreach, including an online survey, walk audit, and bike audit, resulted in community identification of issues and opportunities. The project included an extensive analysis of the existing facilities in Laguna Beach that support or hinder mobility, including sidewalk locations, street grades, and speed limits. The final plan included recommendations to improve mobility citywide.

Mika Community Development Corporation, City of Costa Mesa

Executive Director, Board Member

Jenna served as a board member and Executive Director for Mika Community Development Corporation. Mika worked directly with disadvantaged communities in Costa Mesa on community development, leadership development, and capacity building.

Joan Isaacson

Principal, Senior Facilitator



📍 San Diego, CA

✉️ JIsaacson@kearnswest.com

📞 (619) 966-8077

EXPERTISE

- Public Involvement
- Stakeholder Facilitation
- Participatory Process Design
- Training
- Urban and Environmental Planning

EDUCATION & CERTIFICATIONS

BS, Psychology
Cal State University | Fullerton, CA

MA, Geography
San Diego State University | San Diego, CA

International Association of Public Participation Certification

American Institute of Certified Planners, 1995-2017

MEMBERSHIPS

American Planning Association – San Diego Board, Professional Development Chair

Lambda Alpha Honorary Land Use Economics Society

SUMMARY OF QUALIFICATIONS

Joan Isaacson is a Principal at Kearns & West, and brings 25 years of experience in community engagement, stakeholder facilitation, and urban and environmental planning across Southern California. At the core of her work is a commitment to formulating the best facilitation and engagement strategy where participants can see their fingerprints on the outcomes.

Joan has special expertise in creative, effective community engagement programs for citywide and regional planning projects, focusing on involving the full cross-section of community perspectives. In particular, she has been involved in general plan updates her entire career, and she understands the opportunities for integrating the public's input on community values, ideas, and concerns into prescribed and optional elements. She has also led public involvement programs for local municipal plans involving parks and open space, arts and culture, transportation and transit, water, climate action and resiliency, sea level rise, and CEQA review. Having grown up in coastal Ventura County, and conducted public involvement in coastal cities like Del Mar, Carlsbad, Oceanside, Oxnard, Long Beach, Imperial Beach, San Clemente, Venice, Pacific Palisades, and Coronado, has given Joan insight into the love and care coastal residents have for their community environments.

Joan's participatory programs include focus groups, advisory committees, stakeholder interviews, customized website dialogue platforms, online and telephone surveys, pop-up outreach, public workshops and open houses, webinars, success story campaigns, storytelling, educational videos and newsletters, and media monitoring. She also has special expertise in conducting multi-language and multi-cultural community engagement, in addition to facilitating stakeholder and interagency committee processes. Joan also lectures on public involvement in Southern California, and has served in volunteer leadership roles for community and arts organizations.

RELEVANT EXPERIENCE

City of Mission Viejo Civic Core Vision Plan

Community Engagement Director

Joan led the public involvement program for an exciting visioning process in Mission Viejo. The City Council charged the team with involving the cross-section of Mission Viejo communities in exploring possibilities for new places, experiences and changes in the central civic and commercial core. Working closely with the team urban designers and economists, Joan and her team conducted supporting popup outreach, community workshops, website and social media communications, citywide survey, and youth visioning workshops.

City of Los Angeles Sea Level Rise Adaptation Planning for Venice Local Coastal Program

Public Involvement Director

Joan recently completed a community engagement process for the City of Los Angeles, focusing on providing essential information about sea level rise and flood risks, community vulnerabilities, and mitigation opportunities. Input helped to guide the vulnerability assessment and mitigation planning.

City of Laguna Hills General Plan Update

Public Involvement Director

For the Laguna Hills General Plan Update, Joan formulated and managed a multi-pronged public involvement process. The General Plan Update integrated principles of sustainability and healthy communities into a new long-range vision and development plan. The public participation program involved a General Plan Advisory Committee, a series of public workshops, periodic newsletters, graphic “branding” for all collateral materials, citywide survey, and a planning forum featuring experts in sustainability and healthy communities.

City of Long Beach Southeast Area Specific Plan

Public Involvement Manager

Although mostly built out, several development opportunities occur near wetlands and along Pacific Coast Highway, the primary commercial corridor. Prior attempts to update planning policy languished due to controversy, but in 2013 the City relaunched a participatory process to achieve an implementable plan, including a community advisory committee, public workshops and open houses, informational materials, pop-up outreach, an online discussion forum, and media relations.

California Strategic Growth Council Best Practice Highlights for Sustainable Community Grant-Funded Activities

Project Director

Joan led the Kearns & West team's screening of 125 planning activities funded by the Strategic Growth Council, including focused general plan updates, corridor plans, specific and community plans, and regional sustainable community strategies. The end-product, intended for elected officials, community leaders, and stakeholder interests, showcases examples of planning activities that exemplify multiple sustainability benefits, community engagement and stakeholder collaborations, and integration of unique local strengths.

City of San Diego De Anza Revitalization Plan/Mission Bay Park

Public Involvement Manager and Advisory Committee Facilitator

Joan directed the initial phase of public involvement in the City of San Diego's initial planning for the next chapter of this significant property within Mission Bay Park, balancing new public recreational activities, wetland restoration, mobility improvements, camping, and a sustainable revenue stream. The program included an ad hoc committee, community workshops, an online discussion forum, stakeholder interviews, and pop-up outreach. Joan facilitated all committee meetings and community workshops.

City of Laguna Hills General Plan Update and EIR

Public Involvement Manager and Advisory Committee Facilitator\

For the Laguna Hills General Plan Update, Joan formulated and managed a multi-pronged public involvement process. The General Plan Update integrated principles of sustainability and healthy communities into a new long-range vision and development plan. The public participation program involved a General Plan Advisory Committee, a series of public workshops, periodic newsletters, graphic “branding” for all collateral materials, citywide survey, and a planning forum featuring experts in sustainability and healthy communities.

City of Redlands General Plan Update – Vision Framework

Public Involvement Manager

When with Dyett & Bhatia, Joan played an instrumental role in the community engagement, synthesis, and vision planning for the City's most recent General Plan Update. The multi-pronged community engagement program included a mail survey, community workshops, and stakeholder interviews across in order to optimize the diversity of community voices. The input informed themes to align and focus the General Plan Update with the public's perspectives on needs and opportunities.

City of Coronado Extension of Staff Consulting for Multiple Projects

Project Manager and Community Outreach

Joan served as project manager on behalf of the City for phases of the Hotel del Coronado Specific Plan, Glorietta Bay Master Plan, and Orange Avenue Corridor Specific Plan, including community outreach and process strategy.

City of Carlsbad On-Call Community Outreach Services

Community Outreach Manager

Joan worked with City's public information team on community meetings, informational materials, event planning, and strategy for multiple projects including Art in Public Places project, Carlsbad Boulevard/State Beach, downtown circulation improvements, and wildfire recovery.

Taylor York

Senior Associate



Riverside, CA

tyork@kearnswest.com

951.405.3405

EXPERTISE

- Community Engagement
- Education
- Local Government Policy
- Project Management
- Meeting Facilitation
- Urban Planning
- Transportation
- Energy

EDUCATION & CERTIFICATIONS

BS, Urban and Regional Planning
California State Polytechnic
University, Pomona | Pomona, CA

MEMBERSHIPS

U.S. Green Building Council

**International Association for Public
Participation**

American Planning Association

SUMMARY OF QUALIFICATIONS

Taylor York is a Senior Associate in Kearns & West's community engagement practice, with a specialty in the fields of community engagement, urban planning, energy, and air quality. Taylor has a diverse skill set, including coalition building, project management, community engagement, and collaboration, and has experience engaging a wide range of stakeholder groups on both a regional and local basis.

His experience includes key roles in the outreach components of the Heart of Mission Viejo Vision Plan, the City of San Jacinto General Plan, and the Riverside Northside Specific Plan projects. He currently serves as Coordinator of the Western Riverside County Clean Cities Coalition. Taylor also served as a Planning Intern for the City of Fullerton, CA.

Taylor holds a Bachelor of Science degree in Urban and Regional Planning, from California State Polytechnic University, Pomona, and currently serves as a Steering Committee Member for the Inland Empire Branch of the U.S. Green Building Council, Los Angeles. He is a member of the International Association for Public Participation, through which he has completed training in managing conflict and outrage during public and stakeholder meetings.

RELEVANT EXPERIENCE

Heart of Mission Viejo Vision Plan

Associate

Taylor supported the public outreach component of the Heart of Mission Viejo Vision Plan development. He was responsible for assisting with the strategy and organization of public outreach events, as well as helping to translate public input into useful feedback for the design team. The project seeks to create a vision for what is considered the core of Mission Viejo, and is heavily centered on community input.

San Jacinto General Plan Update

Senior Associate

Taylor currently supports community engagement efforts around the City of San Jacinto General Plan update process, for which the City has prioritized a community-driven process. He is responsible for assisting with the strategy and organization of public outreach events, as well as helping to translate public input into useful feedback for the design team.

Riverside Northside Specific Plan

Senior Associate

Taylor played a key role in the community engagement portion of the Riverside Northside Specific Plan project. The project was heavily guided by community input, and sought to create a healthy, sustainable vision for the neighborhood. The plan will consider land use, transportation, recreation, and natural and cultural resources, as well as other topics. Taylor was responsible for assisting with the strategy and organization of public outreach events, as well as helping to translate public input into useful feedback for the planning and design teams.

Western Riverside County Clean Cities Coalition

Project Manager

As a consultant to the Western Riverside Council of Governments, Taylor currently serves as coordinator for the Western Riverside County Clean Cities Coalition. The Coalition works to create partnerships, conduct large- and small-scale outreach and educational programs, facilitate multi-regional collaboration, and expand the Coalition's mission and reach – to promote healthier communities through air quality awareness, energy and conservation, and health. Twelve Riverside County jurisdictions participate in the program, among dozens of private sector partners.

City of Burbank Complete Streets Plan

Project Manager

The City of Burbank is currently developing a complete streets master plan, with the goal of ensuring the City's streets are accessible, safe and enjoyable for all users. Taylor plays a key role in setting strategy and conducting day-to-day project management efforts for Community Engagement portion of the project. A community-driven process is important for the City of Burbank, and this project represents a new level of engagement in the Community.

Western Riverside County Air Quality Extraordinaire and Environmental Youth Conference

Staff Analyst

Taylor played a key role in the Environmental Youth Conference and Air Quality Extraordinaire programs, both designed to help middle school students understand the complex topics of water conservation, emissions and air quality, energy, and healthy living. The programs were provided at no cost to schools. Taylor worked with the Riverside County Department of Public Health, as well as local water districts, energy providers, and the South Coast Air Quality Management District to conduct the programs, which were provided at no cost to schools.

Los Angeles River Masterplan Update

Senior Associate

Taylor currently supports facilitation of the Steering Committee and Subcommittee process for the LA River Master Plan Update, which addresses community health, housing, land use, parks and trails, flood control and storm water capture, water supply, ecological systems, and dislocation issues.

City of Los Angeles 100% Renewable Energy Study

Senior Associate

The City of Los Angeles has initiated a study focused on achieving a 100% renewable energy supply for the City of Los Angeles. Kearns & West is leading the facilitation of a collaborative working group of experts, who will identify investments and priorities needed to achieve this goal. Taylor supports meeting facilitation, as well as focused outreach activities with project stakeholders.

Western Riverside County Active Transportation Plan

Staff Analyst

Taylor played a key role in identifying need and acquiring funding for development of the Western Riverside Active Transportation Plan – a much needed update to the existing Western Riverside County Non-Motorized Transportation Plan. Through this project, Taylor was closely involved with developing the Riverside County Active Transportation Network, and served as one of its first Co-Chairs. The Network is currently active, and provides an important forum for networking and resource sharing among a wide variety of regional active transportation stakeholders.

Melina Smith

Community Engagement Coordinator



📍 San Diego, California
✉️ msmithcastro@kearnswest.com
☎️ (949) 466 - 9658

EXPERTISE

- Project Management and Support
- Stakeholder Engagement
- Spanish Public Speaking
- Issue and Policy Research
- Environmental Conservation

EDUCATION & CERTIFICATIONS

Bachelor of Science, City and Regional Planning
California Polytechnic University | San Luis Obispo, CA

SUMMARY OF QUALIFICATIONS

Melina Smith-Castro is a Community Engagement Coordinator with Kearns & West in Southern California. Her practice focus is with a specialty in conducting public and stakeholder involvement in the fields of urban planning, sustainability, and environmental conservation. Melina has a diverse skill set, and her experience includes bilingual engagement, facilitation, project management, multi-pronged community engagement strategies, and outreach event planning and logistics.

Melina's current assignments include citywide public involvement programs for the City of Oxnard Parks Master Plan and the City of San Jacinto General Plan Update. For both projects, she contributed to the research and strategy for the community engagement plans, workshop logistical planning and staffing, and input synthesis and summary. A native of San Clemente and previous City of San Clemente intern, Melina also has a firsthand understanding of stakeholder perspectives around balancing new opportunities and preservation in coastal communities. She has spent considerable time in Newport Beach, having been a member of the National USA Surf Team and involved in Newport Beach-based training.

RELEVANT EXPERIENCE

City of Oxnard, Oxnard Parks and Recreation Master Plan Update

Kearns & West is working with city staff and the consulting planners on establishing a community engagement program for a citywide Parks Master Plan. Using alternative outreach methods to involve identified disadvantaged communities, including immigrant farm workers, is top priority. Melina is assisted with the assessment of issues, stakeholders, and communication issues for the Public Engagement Plan, and serves as the primary bilingual team member in outreach programs.

City of San Jacinto, San Jacinto General Plan Update

Kearns & West is working with city staff and the consulting planners on conducting a comprehensive community outreach plan to inform the City's General Plan Update. Using interactive and engaging outreach methods, Melina and the project team members have successfully completed a series of three community workshops and solicited meaningful feedback, based on the Community Engagement Plan that they authored. Melina is currently assisting in bilingual outreach, logistical coordination, workshop summary development, and facilitation support.

California High Speed Rail Authority, High Speed Rail Project

Melina part of an active outreach team using traditional and innovative methods to reach communities typically underrepresented in the planning process. In addition to facilitating small meetings and interviews, her role includes outreach documentation, stakeholder research, and logistics coordination.

County of Los Angeles Public Works, Los Angeles River Master Plan Update

Melina recently joined the Kearns & West team for the Los Angeles River Master Plan Update. She is involved in logistics, notetaking, and summary preparation for Steering Committee and Subcommittee meetings.

Land Use Consulting in San Luis Obispo County

Melina provided local permitting support and due diligence for agricultural and residential land development. She created application packages for clients and managed their projects through the application and permitting process.

Internship with the City of San Clemente

Melina conducted a parking analysis for the “Pier Bowl” beach area of the City of San Clemente. She surveyed coastal access areas, counted parking spaces, analyzed existing conditions, and provided a report with her findings. In addition, she provided analysis and writing support for the City of San Clemente’s 2016 Lighting Ordinance.

City of Santa Maria, Santa Maria General Plan Update

Melina acted as the outreach leader for her class project in proposing policies to the City of Santa Maria for incorporation into the update of their General Plan. Santa Maria is a diverse community with a large Hispanic and Oaxacan Community. She contacted local non-profits, organizations, stakeholders, and city officials to coordinate public outreach events. Melina conducted bilingual outreach at public events, local markets, soccer games, and Boys and Girls Clubs. She created project materials such as brochures and policy proposals. She successfully acquired feedback including the wants and needs of community in the future of their city and spoke on behalf of the class in presenting this information to city officials.

City of Paso Robles, Paso Robles Downtown Revitalization Plan

Melina acted as the outreach leader for her class in creating a design for the industrial downtown of Paso Robles. She contacted landowners with vacant lots in the area and successfully received permission to propose their lots as community gardens and public open space. Melina also conducted community outreach in the form of surveys to receive feedback to better inform the final design proposal. She created project materials including brochures, maps, site plans, and renderings. She presented the final design proposal to the City of Paso Robles on behalf of her class.

Senior Project, Eco-Village Research Project

Melina conducted her senior project in an Eco-Village in Guanajuato, Mexico. She interviewed, profiled, and stayed with community members. She developed methods for connecting with residents of the eco-village. Melina addressed the social and political impacts of self-sustaining communities in Mexico and discussed opportunities for economic autonomy. Her research included outreach interviews within the village, and the greater community surrounded it.



Rajeev Bhatia, AICP ASLA

Partner

Rajeev Bhatia is a planner and urban designer, and one of the most experienced preparers of general plans for California communities (more than 35 comprehensive general plans), having led these for some of the most distinctive cities statewide. He has extensive Southern California experience, including recently completed general plans for Redlands and Carlsbad, as well as ongoing general plan work in Carson and Diamond Bar in Los Angeles County. He also recently led preparation of community plans for the City of San Diego (Southeastern, Encanto, and Mission Valley). An experienced urban designer, Rajeev has led numerous downtown, corridor, and transit-oriented plans, including the Downtown San Diego Plan, which is shaping one of California's most dynamic, mixed-use districts. He has also prepared EIRs for most of these plans, and has prepared local coast programs (LCPs) and climate action plans.

Rajeev is adept at community facilitation and consensus building, and experienced with a wide array of outreach techniques. Relevant experience includes:

General Plans and related EIRs

Sacramento (underway)
Napa (underway)
Diamond Bar (underway)
Carson (underway)
Pacifica (underway)
Carlsbad
Redlands (twice)
Mission Valley Community Plan (San Diego; underway)
Southeastern San Diego Community Plan
Encanto Community Plan (San Diego)
San Benito County General Plan (visioning only)
Woodland
Half Moon Bay
Daly City (EIR only)
Santa Clara
Lodi
Santa Monica
Emeryville
Petaluma
San Bruno
Rohnert Park
South San Francisco
Yuba City
Pittsburg
Sunnyvale
Santa Fe (New Mexico)
Chico
Milpitas
Turlock (twice)
Alameda (twice)

Education

Master of City Planning Master of Landscape Architecture

University of California, Berkeley

University Fellow

Thomas Church Award for Design (first prize)

Outstanding Graduate Student Instructor Award

Bachelor of Architecture

(First Class)

School of Planning and Architecture in New Delhi, India

Awards

Mr. Bhatia's projects have won 29 awards from the American Planning Association, as well as awards from the Urban Land Institute and the Congress for New Urbanism, and the Ahwahnee Award. He has been Fellow of the German Academic Exchange Service (DAAD) and the Asian Cultural Council (Rockefeller Foundation, New York).

DYETT & BHATIA
Urban and Regional Planners

Mr. Bhatia's project has led numerous downtown, transit-oriented development, and community design projects. These include major assignments such as BART Station Area Plans around new stations (such as Milpitas, which is leading the largest amount of new residential development around a BART station in the Bay Area— 7,200 new housing units); San Diego Downtown Plan, fostering the highest-intensity, mixed-use and livable downtown in California (with a population of 90,000); planning for station areas around Honolulu's new rail system; and the Capitol Area Plan in Sacramento for the State of California, which has shaped the largest office development undertaken by the State in its history, in a mixed-use setting. He also prepared the Master Plan for Genentech, which is one of the largest corporate campuses in the Bay Area, with 15,000 employees.

Honolulu Public Views/Skyline Study (underway)

Bayhill Specific Plan (San Bruno; includes YouTube HQ expansion; Underway)

Alvarado Creek/Grantville Revitalization Study (San Diego)

Livermore BART Station Area Specific Plan

Santana Row and Valley Fair Urban Village Master Plan (San Jose)

Winchester Boulevard Master Plan (San Jose)

San Pablo Avenue Specific Plan

San Jose Diridon Station Area Plan

Honolulu Station Area Planning (six stations)

Windsor Station Area/Downtown Specific Plan

Milpitas Station Area Plan

Santa Clara Station Area Plan

Emeryville Citywide Design Guidelines

San Diego Downtown Plan and Zoning

Genentech Campus Master Plan

Capitol Area Plan (Sacramento)

Program EIRs

Mr. Bhatia has led preparation of more than 20 Program EIRs, including more than 15 comprehensive general plan updates, regional transportation plans (including Bay Area Regional Transportation Plan, and countywide transportation plans for Contra Costa and San Francisco), transportation improvement programs (including South San Francisco East of 101 Area Transportation Plan EIR), and specific and area plans. He has also development Transportation Demand Management programs and other mitigation measures.

Zoning and Design Standards

Mr. Bhatia has prepared zoning regulations and design and development standards to implement downtown and community plans, and transit-supportive and mixed-use development regulations. Projects completed include Down- town San Diego zoning, El Camino Real Corridor (South San Francisco) zoning, Tacoma Transit Supportive Development Regulations, and South San Francisco Transit Village Zoning.



Andrew Hill

Associate Principal

Andrew is an award winning urban planner with expertise in land use, transit-oriented development, community engagement, and environmental review. Innovative and collaborative, his work is rooted in a strong commitment to sustainable placemaking and meaningful stakeholder involvement. He has led multi-disciplinary teams in preparing long range plans for communities throughout California, and he possesses over 15 years of project management and leadership experience in the fields of planning, construction management, and engineering. A particular focus of Andrew's recent work has been on incorporating technology into the community outreach process, and he has developed videos, interactive online surveys, "virtual meetings" and a mobile smartphone app for use on planning projects.

Education

Master of Urban Planning (MUP)
McGill University

Honors Bachelor of Arts
(BA Hons)
University of Western Ontario

Awards

2016 AEP Outstanding Public
Involvement Award. Palo Alto
Comprehensive Plan

2008 Clear Vistas Design
Competition. Regina, SK

Speaking Engagements

2017 Presenter, San Ramon Citizens
Planning Academy – CEQA Basics

2015 Guest Lecturer, McGill
University – *Tailoring the General
Plan to Community Needs*

2014 Guest Lecturer, Sonoma State
University – *Public Involvement and
Planning*

Recent Assignments

Sacramento General Plan Update, Climate Action Plan, and Master EIR. Sacramento is California's sixth largest city, with a diverse and growing population. Since 2000, the city has added over 90,000 residents, making it the fastest growing big city in the state, and the city is projected see robust growth in the coming years, including potentially in new sectors such as technology. In this context, the City is undertaking a strategic update to its General Plan, Master EIR (MEIR), and Climate Action Plan (CAP) to respond to dramatic economic shifts and continued expansion following the Great Recession; address emerging trends, new issues, and new State laws; and update implementation measures. A substantial update to the CAP is needed to create an ambitious climate action plan that advances the mayor's objectives and also results in streamlined implementation at the project stage. Andrew and Rajeev are leading a team of experts and leveraging Dyett & Bhatia extensive general plan expertise to help guide the City during the next era of its growth and evolution.

St. Helena General Plan Update and EIR. Located in the heart of Napa Valley, St. Helena is one of the Bay Area's most picturesque small towns, with a population of 6,200 and a land area of about five square miles. The City is undertaking a targeted update to its General Plan, focused on incorporating policies to address new State requirements that have come into force since the plan was last updated and extending the horizon year of the plan. Issues central to the effort include historic resource preservation, economic development, growth management and agricultural preservation. Andrew is leading Dyett & Bhatia's effort, which also includes preparation of an EIR and analysis of sensitive environmental resources and capacity constraints in areas outside the City limit where municipal services are provided.

DYETT & BHATIA
Urban and Regional Planners

Dixon General Plan Update and EIR. Andrew is leading the Dyett & Bhatia team in preparing a comprehensive update to the City of Dixon's General Plan, which will focus on incentivizing infill development in the downtown area and encouraging walkable, transit-oriented development. A key issue for the City involves balancing the economic development advantages of growth with the community's strong desire to retain its small-town character. The plan will also address issues of multimodal connectivity, infrastructure financing, historic preservation and Sphere of Influence expansion.

Palo Alto Comprehensive Plan Update and EIR. Located at the heart of Silicon Valley, Palo Alto has a global reputation for innovation, an enviably high quality of life, and a strong commitment to sustainability. As Project Manager, Andrew led a multi-disciplinary team assisting the City in a broad-based initiative to update the Palo Alto Comprehensive Plan, the blueprint for the future of land use and development in the city. Andrew worked closely with City staff to design and implement a process that "open sourced" the Comp Plan Update. This included using new technology and innovative outreach strategies to achieve unprecedented levels of public participation. A notable success of the project was a citywide Summit that drew over 450 participants. Live polling technology to collect participant input via text message and display results in real-time at the event, and informational videos on critical issues queued up breakout discussions at the event. The videos were also posted online to create a "virtual summit" that attracted over 500 users.

Vallejo General Plan Update and EIR. Andrew led a multi-disciplinary team of experts in preparing a comprehensive update of the City of Vallejo's General Plan and associated EIR. This award-winning project was built on a broad, inclusive process to help the City and the community foster location- and resource-efficient development as well as economic health and stability in the future. Andrew worked closely with City staff to design and implement an extensive public participation program with outreach strategies targeted toward disadvantaged segments of the community and to carefully integrate past and ongoing planning initiatives in the city. An important focus of the plan is fostering urban village nodes throughout the city to serve as neighborhood focal points. Other key issues addressed in the plan include economic development, social equity, community health and historic resource preservation.

CTC Branding Services

In service of our clients, our focus on digital strategy, creative arsenal, and relationships uniquely aligns client dreams to our skill set driving revenue, growing brand awareness, and executing mission statements. We don't just sell stuff online, we invest in and help make our clients' dreams into reality.

CTC's branding department transforms visions into reality. This means conceiving, designing and implementing a consistent look and feel that reflects the mission and goals of clients. CTC specializes in providing businesses with the compelling design and persuasive messaging they need to take a great idea and get people on board with it. CTC has been proud to work with clients from diverse industries such as Born Primitive, VIZIO, Baden Sports, and Fielders Choice Goods.



Jonathan Dickson

Brand identity Designer

Jonathan Dickson is an experienced Designer with a demonstrated history of Design Thinking, Advertising and Brand Strategy. Having worked on a wide variety of projects in Tech, Apparel, Social Good, and local business, he is a versital designer able to execute creative that is a perfect fit for the industry. with experience in print production, UXUI design, Environmental Design, Digital Advertising, and Logo Design, make Jonathan a seasoned creative that uses his experience to make the most out of brands at every touch point. Being trained in Design thinking, Advertising and Brand Strategy,

2017-2019

Common Thread Collective

Brand Identity Designer - Newport Beach CA

The CTC Brand Identity Design Specialist [BIDS] oversees the visual development of brands at large through workshops, ideation, and visual strategy. The brand designer uses design principles to assign visual cues to client brand values generated through the discovery and workshop process. The brand designer also strategizes the implementation of elements across various aspects of the client's visual media.

2014-2017

ROCKHARBOR Church

Art Director - Costa Mesa CA

Worked on the Church wide staff, directing and maintaining ROCKHARBOR's visual identity across 6 Campuses. Brainstormed conceptually driven branding campaigns with a team of creatives, and over saw the execution and implementation of deliverables. Creatively directed interns, and volunteers to create designs rooted in ROCKHARBOR style and communication values.

2012-2014

RECON - Marketing and Distribution

Graphic Designer - Santa Ana CA

Employed as the companies lead designer working with high profile clients, such as GoPro, Sprint, and Yamaha. Lead and assisted creation of a wide variety of marketing materials for our clients. Designed front end eCommerce websites, and backend user interfaces. Designed and created all marketing and sales materials for client presentations. Executed all product photography for all client sites.

2012

Wipit Inc.

Freelance Designer - Pasadena CA

Called in to assist with a high profile “request for proposal” presentation that needed various mock ups for the mobile payment company Wipit. Work included mobile app screens, card letter carrier, and in-store displays. Experienced working as a team and understanding the organization, and execution of a design studio.

SECTION B

METHODOLOGY



OUR APPROACH

People have an intrinsic desire to connect to community – we’re hardwired for it. Connections are made through friendships with neighbors, commitment to organizations, support of local businesses, and shared celebrations of local pride. Cities that foster strong community connection are valued; they are the cities where people seek to live, and businesses flourish. With seven Council Districts and neighborhoods ranging from homes on the bluffs to dense islands buffeting the Harbor, residents of Newport Beach care deeply about their community and look to see that planning processes incorporate their vision for how their City should take shape.

The outreach process to inform a future General Plan update is an opportunity for Newport Beach to create an avenue where constituents are more informed, where people trust that their city officials will seek their input on important decisions, and where every can have confidence that decision-making is responsive and transparent.

We want to set Newport Beach up to successfully implement a General Plan Update that’s rooted and grounded in the community’s vision. Doing so requires an understanding not only of what a General Plan is, but experience in developing and implementing successful General Plan updates. Critical to an outreach strategy is defining where people can have input and what can be shaped. And then providing engaging, meaningful, and fun ways for people to shape the process.

As planners, we know what it takes to develop a General Plan that reflects a community’s vision and meets state regulatory and legislative requirements. As passionate and experienced outreach professionals, we believe this Listen & Learn process is an opportunity to build consensus toward a General Plan vision. But it is also a chance to build and tap into civic pride through opportunities for the community to share what they love about Newport Beach. It is a space to build trust among residents and between residents and the City. To know what is good and lasting in Newport Beach, and how the future can continue to be bright.



THE OUTREACH PROGRAM

Reflecting the Tasks identified in the RFP and the direction from the Steering Committee, we propose a process where people can engage in large formats, small discussion groups, alongside their neighbors, across the City, online, and with their community groups. Our work program is designed for Newport Beach community members to engage both at their neighborhood level and at a citywide level.

Visioning as part of a general plan update involves community members sharing localized knowledge and aspirations for their own corners of Newport Beach. It also involves considering the “big picture” of a citywide vision and exploring how to come together as a unified city with a vision for the benefit of all. That is, as part of the process, community members need to come together with their own puzzle pieces and find ways to put the pieces together where the sum is greater than the parts. Our approach accordingly cycles through a citywide focus during the Listen & Learn launch, followed by two bursts of community-level engagement and concluding with a citywide vision forum to put the pieces together. Online engagement will run throughout the process and mirror the in-person engagement. Stakeholder interviews, Go-to-Them meetings and Pop-Up events will take place throughout the process.

CONSENSUS

We have found that the most effective consensus statements that have lasting impact on communities highlight shared values and a shared vision. They allow people to come into a process with their individual hopes, dreams and ideas for their home and community and see themselves reflected in the statement, where the sum is greater than all the parts. Instead of requiring total agreement, effective consensus statements are built from a process that gathers people around shared vision and values and works towards consensus.

THE VISION GUIDE

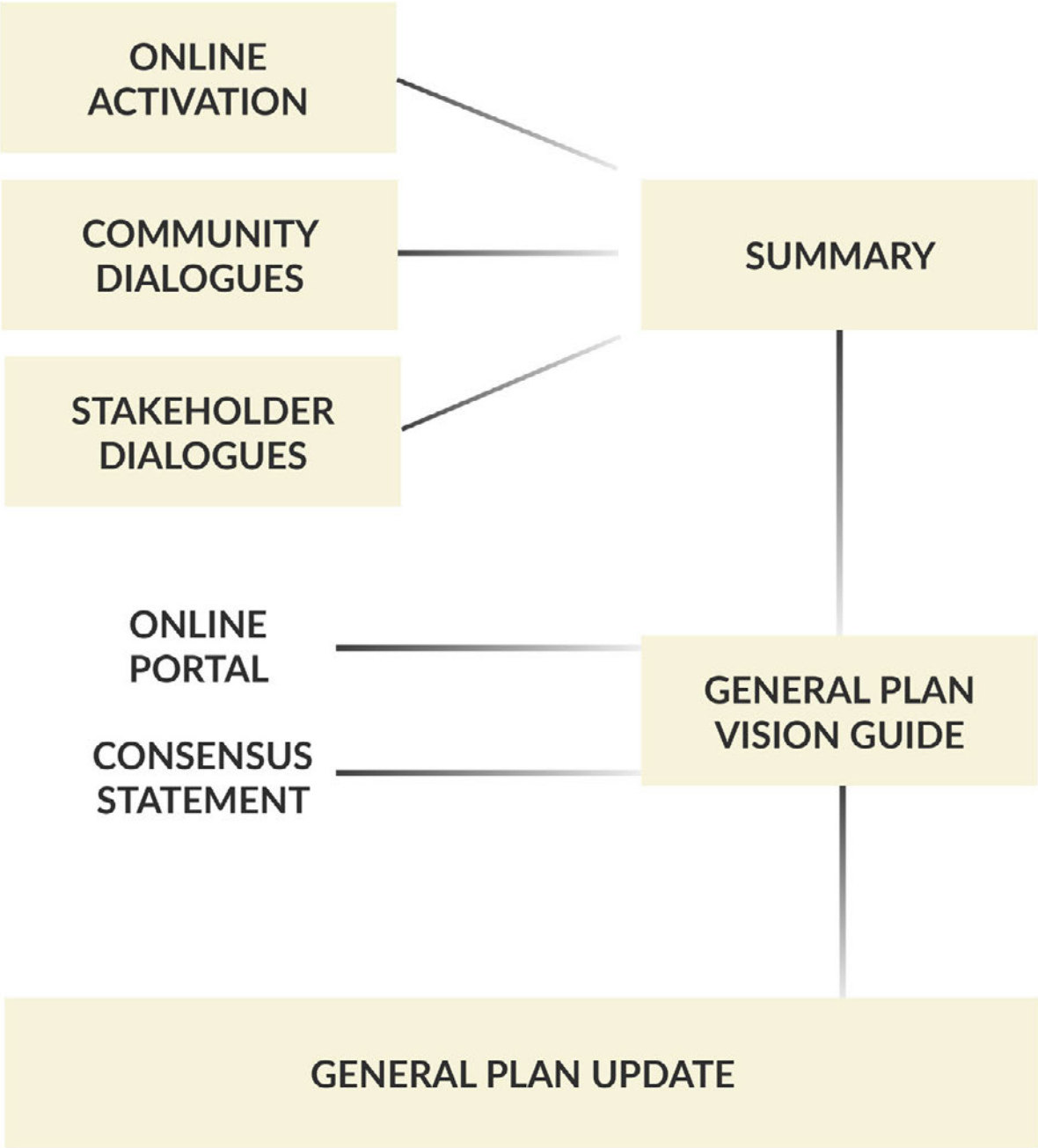
The final product will be a guide for how the General Plan should be developed grounded by the vision and values of the Newport Beach community. Throughout the process, we will work with the community to provide information and education on the General Plan at every step. We will work through the Vision, engaging with neighbors on whether the Vision still reflects the community or whether it should be updated. For the individual elements, goals, and policies, engagement will focus on explaining the purpose of the element, identifying community needs and priorities, and seeing where goals and policies should be shifted or reoriented to reflect the existing needs and vision in Newport Beach.

The guide will provide the following:

- In-depth information about perceived needs, issues, and opportunities
- Reactions that residents and stakeholders have to the existing goals and goal structure
- Consensus statement validated through both the City summit and online engagement

The guide will be available through the EngagementHQ online portal that will act as a compendium of all the voices engaged in the process, from neighborhood discussions to online mapping and citywide summits.

OUR PROCESS





SCOPE OF SERVICES

TASK 1: CONSULTANT FAMILIARIZATION WITH THE GENERAL PLAN

1.1 KICK-OFF MEETING + TEAM MEETINGS

As a first step, the Kearns & West team will lead a kickoff meeting with City staff and the Steering Committee to review and confirm the project scope and schedule, to identify stakeholder groups, and outline project priorities.

At the project kickoff meeting, Kearns & West will conduct an outreach assessment, which will involve a discussion of the benefits and drawbacks of various outreach strategies and digital tools, along with a staff and steering committee discussion of past community engagement efforts, successes, and lessons learned. The assessment will also address any communication needs that are unique to Newport Beach. Based on the input received, Kearns & West will develop the Community Engagement and Outreach Program in Task 2.1.

The Kearns & West team will also hold bi-weekly team meetings with the City. These can be in person or on the phone as determined by the City and project team.

TASK 1.1 DELIVERABLES:

- Develop agenda and attend Kick-off Meeting
- Provide summary of Kick-off Meeting
- Outreach assessment facilitation
- Attend project team meetings

1.2 STEERING COMMITTEE MEETINGS

The General Plan Steering Committee will play a vital role in the outreach program. Kearns & West will be in attendance at Steering Committee meetings and report back on the status of the outreach program and incorporate guidance on outreach objectives. The project manager will attend Steering Committee meetings during the Listen & Learn phase, with additional project team members joining at key points during the process as necessary to observe, participate, and prepare detailed minutes. We will also provide a monthly written briefing to the Steering Committee with key outreach insights.

TASK 1.2 DELIVERABLES:

- Attendance of 12 Steering Committee meetings (cost per meeting indicated in the budget, final number to be determined)
- Summary/minutes for each Steering Committee
- One-page project brief each month provided to the Steering Committee

1.3 GENERAL PLAN DIAGNOSTIC

Since the last comprehensive update 12 years ago, a number of new laws with potential implications for the Newport Beach General Plan have come into force. In 2017, the California State legislature enacted a package of legislation to facilitate construction of housing with new regulatory and financial resources. Additionally, the passage of SB 743 means that as of June 2020, level of service (LOS) will be replaced by vehicle miles traveled (VMT) as the sole basis for identifying significant transportation impacts under the California Environmental Quality Act (CEQA). SB 1000 has introduced new requirements for environmental justice in General Plans, while SB 379 requires that the effects of climate change be addressed. Further, the Governor's Office of Planning and Research issued new General Plan guidelines in 2017.

As an initial step to provide context for the community engagement to follow, Dyett & Bhatia will conduct a diagnostic of the current General Plan and prepare a memo highlighting updates are needed to ensure compliance with new laws and guidelines. The memo will be used by the project team to inform the community as to the purpose and need of the General Plan Update project, as well as to frame key issues that should be part of the community conversation.

TASK 1.3 DELIVERABLE:

- One (1) General Plan Diagnostic Memo

TASK 2: COMMUNITY ENGAGEMENT AND OUTREACH PROGRAM PREPARATION

PROGRAM DEVELOPMENT

2.1 COMMUNITY ENGAGEMENT AND OUTREACH PROGRAM

Following the project kick off meeting, assessment and diagnostic memo in Task 1, the Kearns & West team will prepare a Community Engagement and Outreach Program. The Program will include elements necessary for the Kearns & West team, City staff, and the Steering Committee to ensure active public engagement in the Newport Beach General Plan through developing an outreach and participation program for residents and stakeholders. The Program will incorporate stakeholder analysis, an outreach program, a communications plan, roles and responsibilities, and a calendar.

- **Stakeholder Analysis.** Kearns & West will conduct a stakeholder analysis to identify stakeholders that represent different Council Districts, community groups, ages and interests within Newport Beach and develop a customizable outreach approach. Stakeholders could include business groups, community services agencies, Visit Newport Beach, churches and other youth organizations/schools.

TASK 2.1 DELIVERABLES:

- One (1) draft and one (1) final Community Engagement & Outreach Program

- **Communication Strategy.** The communication strategy will identify the specific media that should be developed (website, mailers, flyers, posters, email notices, etc.) that will create awareness and excitement about the process. Multiple communication channels will ensure that people will receive information where they are active. These could include the following:
 - Website updates
 - Social Media updates
 - Email list communication
 - Flyer/posters/postcards
 - Newsletters
- **Programs/Activities.** The Kearns & West team will work with City staff to develop the most appropriate, meaningful (and fun!) set of workshops and activities to deeply engage the most participants possible. The activities and programs will focus on activating community members to engage in the Listen & Learn process.
- **Program Needs.** Upon determination of the outreach program, the Kearns & West team will identify the materials needed for the programs or activities, including worksheets, handouts, and PowerPoint Presentations potentially needed for each of the activities. This section will also, as appropriate, identify the type of space needed.
- **Roles and Responsibilities.** The Kearns & West team will describe the roles and responsibilities for the outreach efforts, materials, and logistics of the programs/events developed as part of the Outreach Program.
- **Timeline.** A timeline highlighting key steps in the Public Outreach and Participation Program will be developed, including dates of outreach efforts, activities, and evaluation. The detailed calendar will include deadlines for material production, mailing, etc.

2.2 GRAPHIC IDENTITY

In coordination with City staff and the steering committee, the Kearns & West team will create a unique graphic identity to establish a visual language for Listen & Learn phase to communicate the goals of the project and garner ongoing enthusiasm for participation that can be translated into the General Plan update. This involves translating community personality, local culture, and unique project attributes into a graphic language, or style guide, of fonts, images, colors, and layout concepts. This template is then used for all project products, including the website, marketing and educational materials, and final reports. Along with developing a visual identity, the team will work with the City and Steering Committee to identify key messaging to communicate what is different about this process than others.

TASK 2.2 DELIVERABLES:

- One (1) draft and one (1) final visual identity concept
- One (1) draft and one (1) final messaging memo

2.3 EDUCATIONAL MATERIALS

Kearns & West recommends a variety of techniques to share project information and promote involvement from key stakeholders and the general public. We will work with City staff to share all educational and engagement materials, along with project updates, via the City's website, the project website and engagement tool, existing communication and stakeholder networks, and social media outlets. Decisions about materials will be made when we prepare Community Engagement and Outreach Plan in Task 2.1.

ONLINE ACTIVATION

2.4 ENGAGEMENT HQ

Our team recommends utilizing the online platform EngagementHQ (Bang the Table) for digital activation and engagement throughout the life of the project and beyond. It can replace or supplement the existing project website and be wrapped in the graphic identity developed in Task 2.2. More than just an online survey or project webpage, EngagementHQ offers an integrative engagement platform to share information, gather feedback through multiple avenues to gather community knowledge, foster listening and learning, interpret community need, and serve as a project portal. The EngagementHQ site can be updated throughout the project with new polls, forums, or mapping activities, will host a project schedule, documents and outreach summaries. It is easily integrated with social media, and can be branded to match the project and City graphic identity.

Feedback gathered through EngagementHQ can be exported through their visually rich report-back format with exportable charts & benchmarking, an insight dashboard, and a comment analysis.

2.5 SOCIAL MEDIA AND EMAIL CAMPAIGNS

Kearns & West will develop a social media strategy to communicate about the Listen & Learn phase. These will include shorthand project updates and educational content in the form of Tweets, Facebook posts, infographics for Instagram, and NextDoor posts. The strategy will encourage people to engage in the process and direct community members to the website.

As part of the social media strategy, the project team will develop suggested emails and newsletters to share information about the project and to guide recipients to the project website and community engagement events. Emails could go out through the City Manager's Newsletter, to residents who have opted-in to receiving emails from the City. Email advertisements can also be sent through partner and organizational email lists.

TASK 2.3 DELIVERABLES:

- One (1) draft and one (1) final version of educational materials identified in Task 2.1

TASK 2.4 DELIVERABLES:

- Development and maintenance of the EngagementHQ website
- Data & relationship info from Bang the Table

TASK 2.5 DELIVERABLES:

- One (1) draft and one (1) final Social Media Strategy
- Four (4) series of suggested social media blurbs
- One (1) suggested email draft for each outreach activity

COMMUNITY DIALOGUES

2.6 CITYWIDE LAUNCH EVENT

We want to start off Listen & Learn in a big way, with a citywide event that captures people's attention, hearts, and minds. The launch event's strategic functions are to introduce the community to Listen & Learn, and energize Newport Beach identity and connection to place and people, motivation and commitment to participate, and robust sign-ups for the online platform for future announcements about Listen & Learn events. The launch will also serve as the first opportunity to introduce the existing General Plan vision, framed by dialogue questions about what might be different since its conception in 2006, and what might be the same.

As part of preparing the Community Outreach and Engagement Plan, we will establish the shape and form of the citywide launch event. It could involve public art projects, local music and entertainment, a photo mosaic made with contributions from community members, a storytelling festival, a fair with booths for community organizations, interactive public art wall, kids and teen activities, a world cafe discussion format, social media streaming. The possibilities are endless!

2.7 TWO SERIES OF COMMUNITY WORKSHOPS

We propose a series of two separate workshop series in each Council District to gather feedback on both goals and policies, as well as the Vision. The series will be two "Immersion Weeks" in each Council District. This expands the number workshops in each Council District yet provides opportunities for cost saving and efficiencies while gathering needed and meaningful input in the process.

The first series will be designed to facilitate a dialogue about the purpose, intent, and structure of the General Plan and to review community values in assessing the Vision statement. The second series of workshops will be a review of key issues in the community and whether the current goals and policies in the General Plan reflect the community needs and values. There will also be an opportunity to solicit input on vision related to the new General Plan requirements most relevant to Newport Beach.

Facilitating a series of two Immersion Weeks in each Council District gives residents the chance to have a meaningful dialogue on what is working and what is not working in the General Plan as well as affirming and discussing the Vision. Hosting Immersion Weeks have several benefits:

- Show each Council District that outreach is happening equitably across the City
- Reduce potential resident confusion that could result from a high number of meetings
- Provide cost savings - individual workshops can add up. By hosting each series of workshops in a condensed period, the City can benefit from efficiencies in cost and timing

TASK 2.6 DELIVERABLES:

- One (1) draft and one (1) final Logistics Plan
- Set up and facilitation of the Citywide Launch Event

TASK 2.7 DELIVERABLES:

- Preparation of one (1) draft and one (1) final logistics memo before each workshop series
- Attendance at 2 pop-up or other events designed to gather feedback and encourage attendance at workshops.
- Workshop attendance and facilitation by two facilitators and a project coordinator
- Coordination City and Steering Committee on presentation and material content
- Dry run to be held prior to workshop

These workshops will include time for participants to engage in fruitful dialogue, creating space for listening and learning between people to identify what is working, what is not working, and how the community envisions the future of Newport Beach.

TASK 2.7 DELIVERABLES CONTINUED:

- Workshop summary that documents attendance, format and presentation, input, and major discussion themes

Listen & Learn - Visioning Series				
Immersion Week 1	Monday	Tuesday	Wednesday	Thursday
	Council District 1	Council District 2	Council District 3	Council District 4
Immersion Week 2	Monday	Tuesday	Wednesday	Thursday
Location	Council District 4	Council District 5	Council District 6	
Listen & Learn - Goals and Policies Series				
Immersion Week 1	Monday	Tuesday	Wednesday	Thursday
	Council District 1	Council District 2	Council District 3	Council District 4
Immersion Week 2	Monday	Tuesday	Wednesday	Thursday
Location	Council District 4	Council District 5	Council District 6	

2.8 POP-UP OUTREACH (4)

We proposes up to four (4) Pop-Up Events to engage community members in Listen & Learn for the General Plan Update during community activities where many people gather. Their primary role in Listen & Learn is to inform people about the project and involvement opportunities, collect sign-ups for the Engagement HQ and project announcements for future participation, and solicit input on the spot using a quick but meaningful activity. Pop-up workshops, sometimes known as tactical urbanism, are a fun and engaging way to bring the community together around projects and plans using short-term and scalable activities out in the places where people gather. These are especially geared for community members that might not attend traditional workshops. These Pop-Ups will be designed for City staff to be able to replicate at additional events.

Potential pop-up events can occur at the following events, as well as through other activities identified in Task 2.1:

- Balboa Island Art Walk - May
- Corona Del Mar Scenic 5k - June
- 16th Annual Art in the Park - September
- Concerts on the Green - August - September
- Earth Day at the Bay - April 2020
- Newport Beach Certified Farmers Market - ongoing

TASK 2.8 DELIVERABLES:

- Design and facilitation of up to four (4) Pop-Up Workshops
- Summary of Pop-Up input

STAKEHOLDER DIALOGUES

2.9 STAKEHOLDER DIALOGUES

One-on-one outreach will be grounded in stakeholder meetings with key individuals and stakeholders who can provide targeted input into the process. Kearns & West will conduct interviews and conversations with stakeholders identified through the Outreach Program to gather a broad range of perspectives are integrated into the outreach process. Up to two members of the consultant team are anticipated to attend these meetings. While a total number of stakeholder dialogues has not been identified, we anticipate up to 20 stakeholder dialogues at the front end of the process to quickly get the word out about the project, convey the involvement process, ask for help in getting the word out, getting advice on the best ways to engage the community.

TASK 2.9 DELIVERABLES:

- Identification of stakeholder dialogues
- Dialogues with stakeholders in Newport Beach at a cost-per-meeting basis
- Summary of key findings

2.10 GO-TO OUTREACH

Using a “go to them” strategy, the Kearns & West Team team will attend up to ten (10) regularly scheduled meetings of local groups, organizations, and/or churches to build community enthusiasm and interest in the Listen & Learn process. Community organizations and interest groups could include local churches and parishes, youth and senior groups, and philanthropic groups as determined during Task 2.1. A short PowerPoint and/or set of display boards and handouts will be prepared for use at these meetings, and made available for staff use at additional meetings to expand the number of organizations reached through Go-to meetings.

TASK 2.10 DELIVERABLES:

- Attendance at up to ten (10) meetings
- Presentation materials
- Summary of input received

CITYWIDE CONSENSUS

2.11 CITYWIDE SUMMIT

The Citywide Summit is the culmination of engagement activities for the outreach program, bridging neighborhoods, age groups, and interests and creating space for a cross pollination of ideas and input.

During the summit, the project team and Steering Committee will report back what we have heard throughout the process, including insight on the existing goals and policies. The team will then present alternative articulations of the General Plan Vision developed through previous community engagement for participants to review and move towards consensus. While the format of the Citywide Summit will be determined through the Community Engagement and Outreach Program and alongside City staff and the Steering Committee, we envision a large community forum with breakout sessions and diving deep into Vision alternatives. After the small group breakout, attendees would gather back together and participate in live polling activities to affirm different elements of the Vision.

TASK 2.11 DELIVERABLES:

- Preparation, set-up and facilitation of the Citywide Summit
- Summary of input received

Mirroring the Citywide Launch (Task 2.6) at the outset of the project, the Summit will be celebratory, inspiring, and honoring to the residents, stakeholders and community members who participated throughout the process.

An interactive, online process will take place simultaneously through Bang the Table for community members who are unable to attend in person. The online simulation will run for several days after the Citywide Summit to engage as many participants as possible.

TASK 3: CAPTURING COMMUNITY DESIRES

3.1 DRAFT VISION GUIDE

Kearns & West will incorporate summaries and voices from each stage in the engagement process and develop a draft vision guide. The draft vision guide will provide the following:

- In-depth information about perceived needs, issues, and opportunities
- Reactions that residents and stakeholders have to the existing goals and goal structure
- Consensus statement validated through both the City summit and online engagement

The draft will be in a format for City staff and Steering Committee to review and comment upon. Feedback will be incorporated into the Vision Guide to be hosted on the online portal.

3.2 FINAL VISION GUIDE

Based on the feedback and guidance from City staff and the Steering Committee, the Vision Guide will be updated and formatted into a “final” version. The guide will be available through the EngagementHQ online platform, or portal. This platform will be a continuation of the project website and engagement tools, and serve as a compendium of all the voices engaged in the process, from neighborhood discussions to online mapping and citywide summits.

TASK 3.1 DELIVERABLE:

- One (1) draft Vision Guide

TASK 3.2 DELIVERABLES:

- One (1) draft review of the online portal and Final Vision Guide
- Final Vision Guide

WORK SCHEDULE

		Start Date	End Date	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March
1	Task 1: Consultant Familiarization With the General Plan											
1.1	Kick-off Meeting & Team Meetings	July 2019	March 2020		•	•	•	•	•	•	•	•
1.2	Steering Committee Meetings	July 2019	March 2020	•	•	•	•	•	•	•	•	•
1.3	General Plan Diagnostic	July 2019	July 2019	•								
2	Task 2: Community Engagement & Outreach Program											
	Program Development											
2.1	Outreach Program	July 2019	July 2019									
2.2	Graphic Identity	July 2019	July 2019									
2.3	Educational Materials	July 2019	March 2020									
	Online Activation											
2.4	EngagementHQ	July 2019	March 2020									
2.5	Social Media & Email Campaigns	July 2019	March 2020									
	Community Dialogues											
2.6	Community-wide Launch	July 2019	July 2019	•								
2.7	Community Workshops	August 2019	Dec 2019		•	•		•	•			
2.8	Pop-up Outreach	August 2019	Feb 2020				•			•	•	
	Stakeholder Dialogues											
2.9	Stakeholder Dialogues	July 2019	Sept 2019									
2.10	Go-to Outreach	July 2019	March 2020									
	Citywide Consensus											
2.1	City Summit	April 2020	April 2020									
3	Task 3: Capturing Community Desires											
3.1	Draft Vision Guide	April 2020	March 2020									
3.2	Final Vision Guide	March 2020	March 2020									
Chart KEY:	Ongoing Scope of Work	• (event month)										

SECTION C

PROPOSER EXPERIENCE



COMMUNITY ENGAGEMENT FOR THE MISSION VIEJO CIVIC CORE

City of Mission Viejo

March 2016 – March 2017

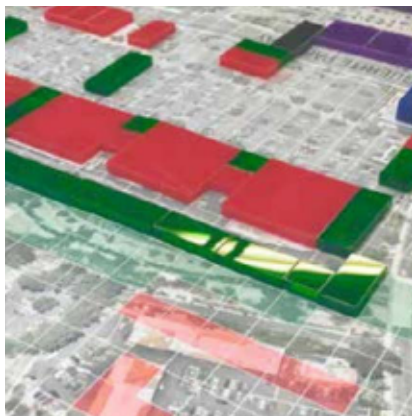
K&W Staff Joan Isaacson, Taylor York

Timing: March 2016 - March 2017

DESCRIPTION

Kearns & West recently concluded a successful community engagement program for an exciting visioning process in Mission Viejo. The City Council charged the team with involving the cross-section of Mission Viejo communities in exploring possibilities for new places, experiences, and walking in the central civic and commercial core. Reorienting and connecting activity to the beautiful natural creek which is currently closed off at the back of commercial centers became a new focus, building on Mission Viejo's systems of trails and open spaces. Prior planning attempts had been derailed by a small but vocal group of entrenched community members. The team's challenge was to involve the many newer residents who made decisions to make Mission Viejo home, for more representative input.

Kearns & West, working closely with city staff and the planning and design consultants, utilized a multi-pronged approach of popup outreach, a series of community workshops, website and social media communications, property owner meetings, citywide survey, and youth visioning workshops. Popup outreach at a community dog walk and the annual symphony-in-the-park summer event greatly expanded input in addition to increasing participation in the workshop series. The program was underpinned by a community engagement strategy that integrated community involvement in the steps of the planning process. In "standing room only" chambers, the City Council unanimously approved the plan in part due to the successful public involvement.



LAGUNA BEACH VILLAGE ENTRANCE COMMUNITY OUTREACH

City of Laguna Beach

2016 – 2017

K&W Staff: Jenna Tourje*

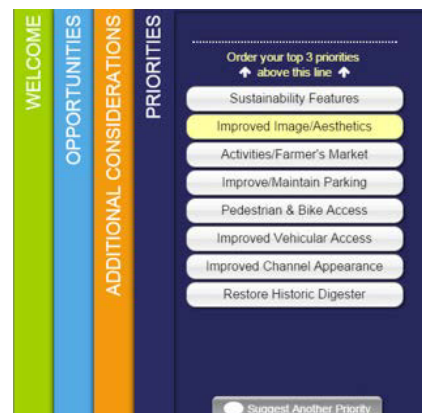
Timing: 2016 - 2017

DESCRIPTION

Jenna Tourje, now with Kearns & West, coordinated outreach activities for the Laguna Beach Village Entrance Project. A project that took over 25 years to be approved, the outreach for the final iteration of the Village Entrance project was tantamount to the project being approved and implemented. Planning for the \$11 million project included an extensive community outreach component. The foundation of the community engagement was an extensive yet flexible community outreach plan that allowed for a multi-pronged approach to integrate the community's vision into the phases of the planning process. Outreach included extensive workshops at each phase of the design process, digital engagement, pop-up workshops at Farmers Markets, and guided and self-guided tours of project area. The outreach team was heavily engaged with the design team to ensure that the community could see its values reflected in the project.

The Village Entrance Project focuses on improved circulation and traffic flow, creating a safe environment for pedestrians, bicycles and vehicles. Project elements will feature surface parking for 370 vehicles and more than 100 bicycles; new pedestrian pathways; lighting and enhanced landscaping. The two-year construction schedule will ensure parking is available during the busy summer tourist seasons.

* Project completed before joining Kearns & West



SAN JACINTO GENERAL PLAN OUTREACH

City of San Jacinto

2018 – Present

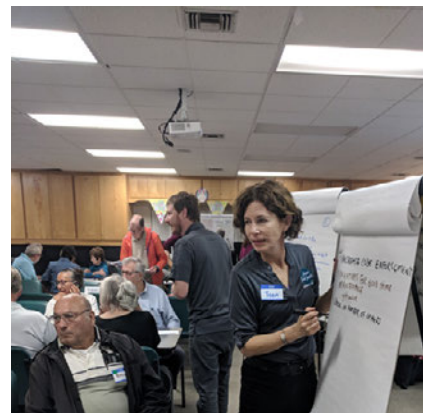
K&W Staff: Jenna Tourje, Joan Isaacson, Taylor York

Timing: 2018 - Present

DESCRIPTION

The Kearns & West team is currently leading the outreach for the San Jacinto General Plan Update. Outreach for the general plan is focused on engaging residents early and often in the process. Beginning with a series of Visioning Workshops, outreach includes digital engagement through online surveys and social media, Pop-up events at the Summer Concert Series, stakeholder interviews and focus groups.

The Envision San Jacinto | General Plan 2040 planning process includes an update to the City's General Plan and the corresponding EIR, as well as a focused update to its Zoning Ordinance, a stand-alone Climate Action Plan, Cultural Landscape Study, and the Housing Element. As one of the oldest cities in Riverside County, San Jacinto plays an important role in the regional landscape and is connected (literally and figuratively) to the region through shared history, cultural, and infrastructure. Using planning best practices and new digital ways to gather and convey information, the General Plan will support and implement department goals and objectives, the Operating Budget, and Capital Improvement Plan.



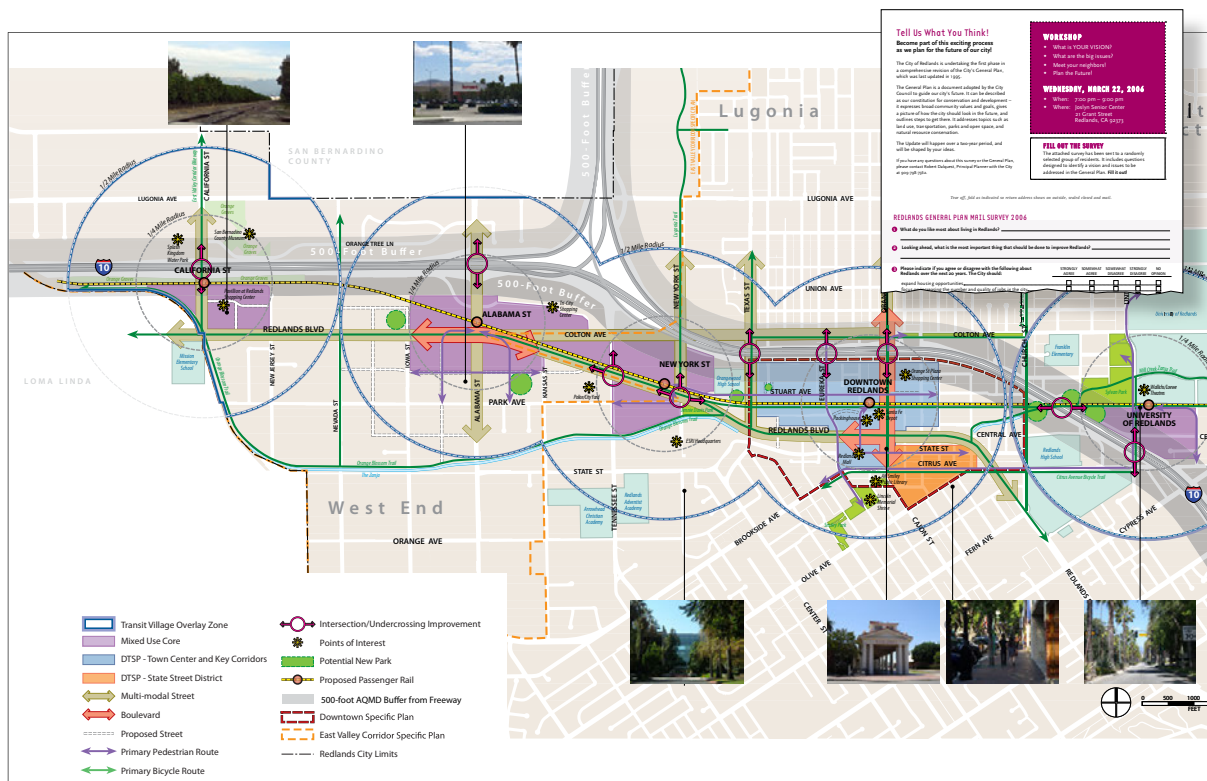
Redlands General Plan, Climate Action Plan and EIR

REDLANDS, CALIFORNIA
ADOPTED DECEMBER 2017
APA Inland Empire Chapter
Award of Excellence,
Comprehensive Planning,
Small Jurisdiction (2018)

The City of Redlands is known for its unique and historic character, enviable quality of life, and beautiful natural setting. Over the years, successful planning efforts have resulted in the development and preservation of desirable neighborhoods.

The Redlands General Plan is organized around “themes” reflecting community values and principles, developed through extensive outreach that included community workshops, online surveys, and close collaboration with a General Plan Steering Committee and decision-makers. The Plan seeks to maintain compact growth patterns, preserve surrounding open space and the city’s citrus heritage by promoting an “emerald necklace”, and organizes new growth in five mixed-use transit villages centered around the proposed Redlands Passenger Rail (extension to Metrolink). Complete streets, connectivity, sustainability, livability, and community health are priorities.

The General Plan was completed over an intensive two-year effort and adopted by the City Council in December 2017. Dyett & Bhatia also prepared the Climate Action Plan, which shows that with integrated land use and transportation planning and an extensive set of policies promoting sustainability, the City can attain greenhouse gas reduction targets without any additional measures. Optional measures and their impacts are quantified should the City seek to pursue these in future.



DYETT & BHATIA
Urban and Regional Planners

San Diego Community Plans (Downtown, Southeastern, Encanto, Mission Valley, and University)

SAN DIEGO, CALIFORNIA
2015 TO PRESENT

APA NATIONAL PLANNING
ACHIEVEMENT AWARD FOR
PUBLIC OUTREACH (2015)

APA SAN DIEGO
SECTION AWARD FOR
COMPREHENSIVE
PLANNING (2016)

Client: City of San Diego

Nancy Graham, Development
Project Manager,
(619) 236-6891,
nhgrahams@sandiego.gov

Budgets varied

(Example: Southeastern San
Diego Cost: \$1,280,000)

Spread out over an area of more than 300 square miles, San Diego is America's eighth most populous city, and California's second largest. The city's national-award winning General Plan outlines a strategy of infill development tied to the regional transportation network, while preserving the surrounding open spaces.

While the General Plan lays out the broad framework, detailed integrated planning occurs at the community scale—with communities the size of some cities—with Community Plans, accompanied by full program EIRs, serving as the local general plans.

Since adoption of the citywide General Plan more than a decade ago, Dyett & Bhatia has led a series of community plans and their EIRs for some of the most distinctive communities. These include:

- **Downtown.** Multiple-award winning plan and zoning that is leading to extensive infill development (with one out four units in San Diego in last 10 years built in downtown), with an eventual population of 90,000 in a dynamic, livable, mixed-use setting. Adopted 2007. Review by Dyett & Bhatia to be soon initiated.
- **Southeastern and Encanto Neighborhoods.** Southeast of Downtown along a trolley line, these contain some of the city's oldest and ethnically-diverse neighborhoods. Adopted 2015. Winner National APA award for outreach, and section and state APA awards for planning.
- **Mission Valley.** The city's earliest settlement area, defined by the San Diego River, and home to the largest malls, as well as offices, hotels, and Qualcomm Stadium, in a high-intensity but suburban-style setting, being re-planned with a focus on connectivity, walkability, mixed uses, and access to the river. Preferred Plan completed.
- **University.** Home to UCSD, Scripps, and Salk Institute, and large number of established neighborhoods, with a new trolley line being extended. Project recently initiated.
- **Citywide.** D&B is preparing mixed-use regulations (first ones outside of downtown) for the city.

Community Health

Community Health in the Community Plans

Health and quality of life are essential ingredients for communities to thrive. From a General Plan perspective, however, we are concerned with the ways that policy and programs can create better health outcomes for the entire community. The community plans will help support healthy living by providing good sidewalks and trails (Mobility). Land Use policies will help bring healthy food choices. Safety will be supported by policies in both the Mobility and Public Facilities and Services elements. Environmental quality will be furthered by Conservation Element policies.

Community Health Strategies

Healthy Living



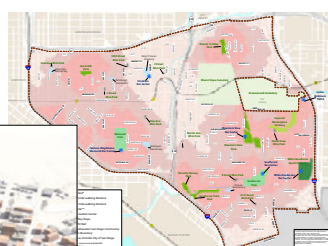
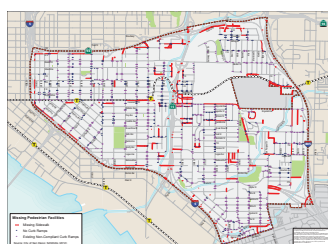
Many streets in Southeastern San Diego and the Encanto Neighborhoods lack adequate sidewalks and bike facilities. Parks provides for active play areas in urban neighborhoods. Bike lanes, priorities for pedestrian improvements and trails, and new park spaces will be identified by the community plans.

Access to Healthy Food

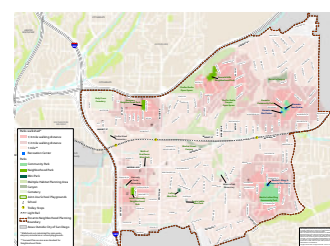
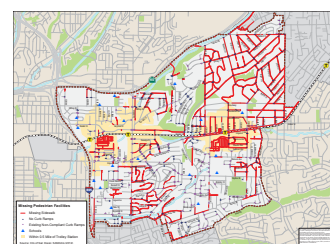


More healthy food retailers and farmers' markets are desired in Southeastern San Diego and the Encanto

SOUTHEASTERN



ENCANTO



DOWNTOWN

DYETT & BHATIA
Urban and Regional Planners

Carlsbad General Plan, Housing Element, Climate Action Plan, and EIR (Envision Carlsbad)

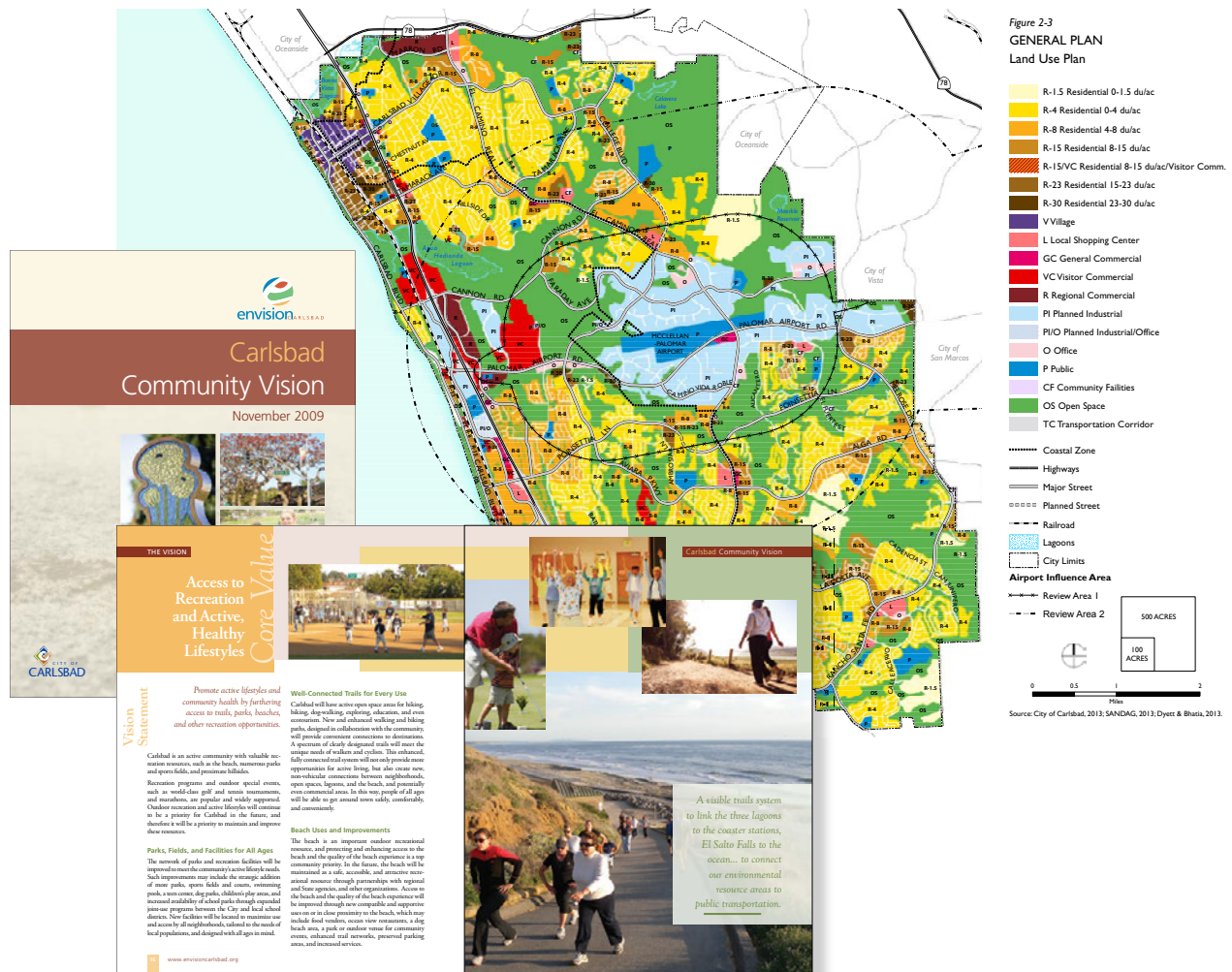
CARLSBAD, CALIFORNIA
ADOPTED 2015
APA SAN DIEGO SECTION
HONORABLE MENTION
FOR COMPREHENSIVE
PLAN, LARGE
JURISDICTION (2017)

Carlsbad, with a population of 104,000, occupies 42 square miles of beaches, bluffs, and rolling landscape on the northern coast of San Diego County. The city is a major employment hub and visitor destination, with a general aviation airport, three lagoons, beaches, Legoland, and numerous resorts.

The General Plan seeks to maintain the community's small-town charm and visual quality, while introducing mixed-use neighborhood centers, emphasizing walking and biking, and revitalizing downtown. The plan also seeks to enhance access to the seven-mile long waterfront, and activate it with strategically-placed nodes.

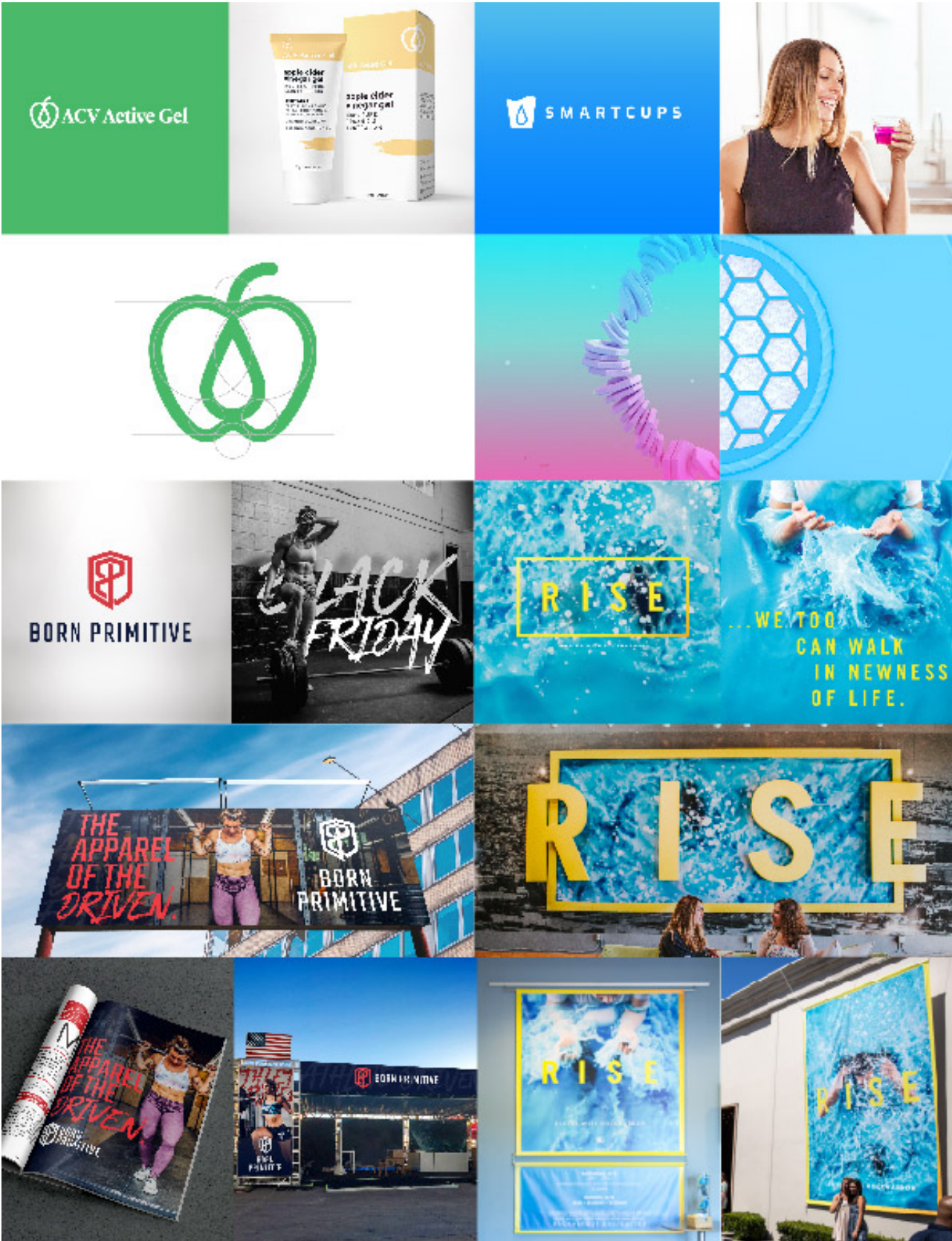
Additionally, as part of the project, Dyett & Bhatia prepared the Housing Element (certified by HCD), and the Climate Action Plan, which was adopted concurrently with the General Plan. D&B also prepared an EIR for the project.

The Envision Carlsbad planning process included extensive outreach led by D&B, with hundreds of community members participating in workshops, and more than 7,000 responses to a citywide mail-in survey.



DYETT & BHATIA
Urban and Regional Planners

COMMON THREAD COLLECTIVE - BRAND WORK



REFERENCES

We have assembled a team of dedicated outreach professional and General Plan experts to work with the City of Newport Beach and the General Plan Steering Committee to listen and learn with the community for a future General Plan Update.

Our team has real-world experience assisting communities similar to Newport Beach with this type of work. We've worked with cities and counties throughout California to conduct multi-pronged and citywide outreach on all types of plans, as well as creating successful general plans that reflect the community's vision and values.

Facilitating a successful process takes experience. The City needs to be able to count on their team to recommend best practices, use new technologies and creative engagement strategies, and implement the work plan on schedule and on budget.

To further describe our team's relevant qualifications, we have included brief project profiles of key projects referenced below in the previous section.

CLIENT	PROJECT	CLIENT REFERENCE
Kearns & West		
City of Mission Viejo	Community Engagement for the Mission Viejo Civic Core	Larry Longenecker, Planning and Economic Development Director City of Mission Viejo 200 Civic Center, Mission Viejo, CA 92691 (949) 470-3053 llongenecker@cityofmissionviejo.org
City of Laguna Beach	Village Entrance Project	Wade Brown, Project Director City of Laguna Beach 505 Forest Avenue Laguna Beach, CA 92651 (949) 497-0360 wbrown@lagunabeachcity.net
City of San Jacinto	Community Outreach for Envision San Jacinto General Plan 2040	Travis Randel, Community Development Director City of San Jacinto 595 S. San Jacinto Ave San Jacinto, CA 92583 (951) 487-7330
Dyett & Bhatia		
City of Carlsbad	City of Carlsbad General Plan Update	Jennifer Jesser Senior Planner City of Carlsbad Planning Department (760) 602-4637 jennifer.jesser@carlsbadca.gov
City of San Diego	City of San Diego Community Plans	Nancy Graham Development Project Manager (619) 236-6891 nhgraham@sandiego.gov

SECTION D

PROPOSAL ATTACHMENTS



ATTACHMENT A: STATEMENT OF COMPLIANCE

Instructions: Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

No Exceptions. The undersigned declares that the Proposal submitted by (Name of Firm) Kearns & West to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.


Signature

4/23/15
Date

Kent Schwan CEO
Printed Name and Title

Exceptions. By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) _____ has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

Signature

Date

Printed Name and Title

[Attach a separate sheet(s) detailing each exception being taken]

ATTACHMENT B: PROPOSER INFORMATION FORM

Instructions: Complete the form below and remit as part of your Proposal as Attachment B.

CONSULTANT INFORMATION

CONSULTANT/FIRM NAME: Kearns & West

ADDRESS FOR NOTICES: 3956 30th Street, San Diego, CA 92104

MAIN CONTACT (NAME AND TITLE): Joan Isaacson, Principal

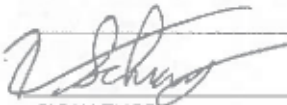
CONTACT NUMBERS: TELEPHONE: (619) 966-8077 FAX: (619) 966-8077

E-MAIL ADDRESS: JIsaacson@kearnswest.com

FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

1. CONSULTANT AUTHORIZED SIGNATORY(IES):

	<u>Kent Schwar</u>	<u>CEO</u>	<u>4/23/19</u>
SIGNATURE	PRINT NAME	TITLE	DATE

SIGNATURE	PRINT NAME	TITLE	DATE
-----------	------------	-------	------

2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:

- | | | |
|---|---------------|--|
| <input type="checkbox"/> Proposer's Bylaws/ Operating Agreement | Section _____ | <input type="checkbox"/> Copy Attached |
| <input type="checkbox"/> Board Resolution | | <input type="checkbox"/> Copy Attached |
| <input checked="" type="checkbox"/> Corporations or Business and Professions Code** | | |

**If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

IMPORTANT NOTE: If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:

PART 1: TECHNICAL PROPOSAL SECTION

SECTION A: PROPOSER BACKGROUND

☒ **COVER LETTER**

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bid the Proposer to contractual obligations.

☒ **ORGANIZATIONAL STRUCTURE**

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

SECTION B: METHODOLOGY

☒ **PROPOSAL – METHODOLOGY**

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.

☒ **ANTICIPATED WORK SCHEDULE**

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

SECTION C: PROPOSER EXPERIENCE

☒ **MINIMUM REQUIREMENT: EXPERIENCE**

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.

☒ **REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

SECTION D: PROPOSAL ATTACHMENTS

☒ **ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

☒ **ATTACHMENT B: PROPOSER INFORMATION FORM**

☒ **ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST**

☒ **OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

PART 2: COMPENSATION PROPOSAL SECTION

☒ **COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

SUBMISSION INSTRUCTIONS

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

(This page left intentionally blank.)

CITY OF NEWPORT BEACH

GENERAL PLAN

RFP# 19-69

April 26, 2019



Proposed by



957 S. Village Oaks Drive
Covina, CA 91724
(626) 967-1510
info@mbimedia.com



Table of Contents

SECTION A: PROPOSER BACKGROUND

SECTION B: METHODOLOGY

SECTION C: PROPOSER EXPERIENCE

SECTION D: PROPOSAL ATTACHMENTS

PROPOSER BACKGROUND



COVER LETTER





April 26, 2019

Mr. Anthony Nguyen
RFQ Administrator
City of Newport Beach
anguyen@newportbeachca.gov

Dear Mr. Nguyen,

It is with great pleasure that McCormick-Busse Inc., dba MBI Media (MBI) submits our response for the City of Newport Beach Request for Proposal No. 19-69 Community Engagement Related to a Future General Plan Update for your review and evaluation.

OUR COMPANY:

MBI is a 100-percent, woman-owned small business corporation that is certified DBE/SBE/WBE. MBI is a strategic communications firm specializing in all areas of outreach, media, and community relations along with full, in-house, multi-media and graphic design studios that allow us the capability of producing all materials and presentations that may be required in an efficient and timely manner.

Founded in 1989, we have 30 years of experience in providing community outreach and digital media services on hundreds of public agency projects. These projects have covered a vast array of types and sectors.

Over the years MBI has also stepped in to assist our clients, like the City of Long Beach, City of Seal Beach, Orange County Department of Public Works, Los Angeles County Metropolitan Transportation Authority, Riverside County Transportation Commission, Ports of Long Beach and Los Angeles and many others. Our goal is to help the City of Newport Beach in developing effective and comprehensive outreach strategies and generate excitement and buy-in for the General Plan.

We have a diverse staff of professionals along with the tools to assist the City's Community Development Department on a community outreach and education program to help the City determine the course of its next General Plan Update. This being very similar of the services we just provided for the City of Long Beach's 2040 General Plan Update.

I, and the entire team at MBI, look forward to the opportunity to support the City of Newport Beach through a passion for our work. We take strong personal care for our clients and relationships we maintain from decades of collaboration and service. We emphasize messages of clarity born out of experience; we stand prepared for any and all contingencies, utilizing a team approach to implement strategies that meet and exceed our clients' expectations. MBI is proud to be a leader in public outreach, placing human respect and dignity at the forefront of our endeavors.

Please feel free to contact me or Dean Owens (dowens@mbimedia.com), our Development and Client Services Manager, throughout the proposal process at the contact information listed.

Sincerely,

Mary McCormick
President & CEO
MBI Media
mary@mbimedia.com

ORGANIZATIONAL STRUCTURE



PROJECT TEAM

MBI understands that the City of Newport Beach (City) is seeking assistance with Community Engagement Related to a Future General Plan Update. We also recognize the importance of clear and direct messaging and the value of asserting a message through compelling communication channels. Therefore, we are prepared to work in partnership with the City to build a community engagement and outreach program (Outreach Program) that is transparent and easily approachable to stakeholders.

MBI is certified as a 100-percent Woman-Owned Business Enterprise (WBE), Disadvantaged Business Enterprise (DBE), and Small Business Enterprise (SBE). Throughout the years, we have provided services to many high-profile clients on a wide range of projects that have and are continuing to shape the landscape of Southern California.

MBI is also immersed in the environmental process with various agencies on several projects and understand the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) and the associated requirements for community outreach. Our team of professionals are well-versed at educating the public on transportation initiatives and engaging communities through innovative methods and designs.

Leading MBI's team are Senior Project Manager Matthew Maldonado, Project Manager Elizabeth Michel and Resource Project Manager Brad Jensen. They will be responsible for performing the services described in the Scope of Services with assistance from Graphic Designer Reuben Garcia, Technical Writer/Copywriter Edgard Zuniga, and our support staff of researchers, designers, and photographers.

In particular, Matt and Elizabeth worked on the City of Long Beach – 2040 General Plan, coordinating with the City of Long Beach to lead a successful public outreach program.

As MBI has undertaken more projects, the company has strategically grown to add staff with a diverse set of skills. As the company grows, so does our ability to effectively engage a wider range of stakeholders, as well as offering a unique blend of expertise including implementing social

media campaigns, video production and live streaming, municipal engagement, elected official outreach strategies, and graphics development. This allows MBI to balance multiple projects and deliverables without reducing quality while still meeting client deadlines.

Establish dynamic collaboration between MBI and the City will facilitate the creation of innovative strategies to educate the public and create proactive community engagement, enhancing overall community awareness and ensuring that the Outreach Program will move forward with positive momentum.

More detailed resumes of the MBI team have been included for reference.



ORGANIZATION STRUCTURE



Matt Maldonado II Senior Project Manager



Education

B.S., Business Administration
Concentration on Marketing
Management and Communications
California State Polytechnic University,
Pomona

Capabilities

Community Relations
Event Planning
Digital Media
Web Design
Graphic Design
HTML
SEO
Database Management

Years of Experience

17

Matt has extensive experience in digital marketing and communications, which has provided the foundation for his current work as the Senior Project Manager at MBI. He has led multiple outreach campaigns in a range of industries and now oversees and manages our multi-disciplinary, diverse and dynamic team to deliver integrated solutions for all of our projects. Matt has the ability to manage complex, multi-phased projects. He works with each project manager and supports the project team to make sure every project is a success. Currently, he is handling Senior Project Manager public outreach responsibilities for the California High-Speed Rail Authority's Palmdale to Burbank Project Section and Los Angeles County Metropolitan Transportation Authority's Long Range Transportation Plan.

Relevant Experience

CITY OF LONG BEACH – 2040 GENERAL PLAN UPDATE, SENIOR PROJECT MANAGER

- Manages all meetings, collateral, and outreach staff for the City of Long Beach General Plan Community Workshop Meetings
- Participates in weekly project update conference calls

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY (METRO) – LINK UNION STATION (LINK US), SENIOR PROJECT MANAGER

- Oversees logistics, secures translation services; performs QA/QC on audiovisual equipment, and coordinates vendors
- Handles logistics and assists in facilitation at public meetings
- Assists in budget planning and ensuring tight fiscal controls
- Participates in conference calls with Metro and Caltrans, providing information, updates, perspective and solutions

METRO – LONG RANGE TRANSPORTATION PLAN, SENIOR PROJECT MANAGER

- Manages all meetings, collaterals, and outreach staff for Special Outreach Events held throughout the numerous cities and sub regions of Los Angeles County
- Coordinates Community-Based Organizations (CBO) and Stakeholder Engagement
- Develops engagement strategy for public engagement involving transportation consumers, transportation providers, and jurisdictions
- Participates in weekly project update conference calls

METRO – EMERGENCY SECURITY OPERATIONS CENTER (ESOC), SENIOR PROJECT MANAGER

- Manages all meetings, collaterals, and outreach staff for the City of Long Beach General Plan Community Workshop Meetings
- Participates in weekly project update conference calls

CITY OF LONG BEACH – SHOEMAKER BRIDGE REPLACEMENT PROJECT, SENIOR PROJECT MANAGER

- Developed a community engagement strategy that builds long term relationships to obtain support for the project
- Coordinates with Project Team all logistics of community meetings, public hearings, elected officials' briefings, and town hall meetings
- Utilizes an extensive database for community outreach, with focus on true stakeholders, boots-on-the-ground, clear understanding of the digital divide, media, social media, and community-based media
- Coordinates community meetings and briefings with stakeholders, and identifies key community leaders and advocates to build relationships

CALIFORNIA HIGH-SPEED RAIL AUTHORITY (CHSRA) – TPALMDALE TO BURBANK SECTION, SENIOR PROJECT MANAGER

- Oversees all collateral development, coordinating with CHSRA on copy and design approval
- Directs the development of CHSRA's project deliverables and ensures they are aligned with and meet the project's goals
- Manages team strategy meetings to coordinate open houses and community presentations
- Assists in facilitation and management of all open house community meetings
- Provides strategic insight and direction for the project team to accurately scope work and leverage the appropriate delivery for CHSRA needs
- Manages staffing for project needs and maximizes the efficiency and optimization of the outreach team

CITY OF LONG BEACH – SHOEMAKER BRIDGE REPLACEMENT PROJECT, SENIOR PROJECT MANAGER

- Design and management of project website
- Initiated database management
- Developed process and protocol
- Developed stakeholder communications and community outreach

NESTLÉ USA – DIGITAL PROJECT MANAGER

- Coordinate and lead the management of all creative projects: packaging, POP/POS, in-store promotional items, digital communications and more for both domestic and international
- Work functionally across multiple departments, from marketing to design, to determine creative recommendations and design objectives while providing oversight across the group
- Work with outside vendors both domestically and international, manage the procurement process for all materials and coordinate all color separation, printing methodologies and pre-press activities
- Manage and report all financials and manage day-to-day business needs for the design group including maintaining and updating procedures and improving processes
- Maintain asset management tool and project management systems
- New product launch, including: evaluating creative strategy, providing feedback to agencies, presenting creative strategy, supervising photo shoots, photo retouching and original illustration development

INDUSTRY HILLS EXPO CENTER – DIGITAL PROJECT MANAGER

- Managed web marketing projects, including website design, e-commerce, social media, email campaigns (response rate of 30 percent) and web traffic (growth of 70 percent)
- Administered e-commerce event sales and marketing resulting in increased sales by 50 percent
- Created and communicated online brand objectives for all levels of the company
- Managed marketing schedules for events, sales and exposure to prospective clients
- Analyzed data on customer demographics, preferences and habits to identify potential markets

Brad Jensen || Project Manager



Education

Business Management Courses
California State University, Fullerton

Capabilities

Plans events, including logistics, setup and tear down

Maintains relationships with government, public, and community stakeholders

Maintains an organized schedule to ensure timely task delivery

Supervises strategic community outreach and public affairs campaigns

Collaborates with project team and consultants on deliverables for complex infrastructure projects in several counties

Years of Experience

15

Brad is a seasoned community outreach project manager with 14 years of experience. His exceptional communication skills allow him to effectively and thoughtfully coordinate and collaborate with a wide range of stakeholders. Flexible, creative, and calm, he can think on his feet in difficult situations, diffusing conflicts before they boil over by guiding parties to equitable solutions. Exceptionally well-organized, he also develops communications strategy plans, coordinates collateral development, plans and facilitates events, oversees and maintains stakeholder databases, and oversees all day-to-day project tasks. He is also well versed in media production and oversees the coordination of all media production projects.

Relevant Experience

ORANGE COUNTY PUBLIC WORKS – SANTA ANA RIVER HOMELESS ENCAMPMENT REMOVAL

- Coordinated and managed all film crew personnel and equipment on site
- Coordinated all scheduling with OC Public Works, County Sheriffs Dept., and Federal Court appointed Judge
- Oversaw all production of the final edits and audio enhancements for final product

RIVERSIDE COUNTY TRANSPORTATION COMMISSION – SR-91 CORRIDOR IMPROVEMENT PROJECT PR/ED, PROJECT MANAGER

- Coordinated with Engineering/Design Team, Environmental Lead, and RCTC to create a Public Communications Plan
- Implemented Public Communications Plan, overseeing all daily tasks
- Oversaw the production of the 3-D animated fly-through video for public information
- Organized public and stakeholder meetings, including special study sessions for local officials
- Managed all special events, including planning, logistics, set up and tear down
- Managed large public toll survey
- Oversaw all collateral development and translation services, including logo and branding, fact sheets, flyers, PowerPoint presentations, brochures, comment cards, project website, 3-D fly-through video, and project video
- Maintained stakeholder database
- Provided project website updates

RIVERSIDE COUNTY TRANSPORTATION COMMISSION – I-15 CORRIDOR IMPROVEMENT PROJECT PA/PD, PROJECT MANAGER

- Created and implemented communications plan in conjunction with RCTC
- Facilitated workshops with local and regional agencies to cultivate project understanding
- Developed stakeholder database

Brad Jensen II Project Manager



- Developed successful strategies that gained community and stakeholder support for the project
- Managed all collateral development, including logo and branding, and project website
- Produced public-access-channel information collateral
- Worked directly with City of Corona staff to update project information

CITY OF RIALTO – PERCHLORATE CONTAMINATION AWARENESS OUTREACH, PROJECT MANAGER

- Worked directly with Outreach Manager on developing multiple strategies
- Managed logistics for public meeting regarding this highly controversial issue
- Worked with MBI graphic designers to create branding, logos and collaterals
- Worked with City to conduct one-on-one interviews with local stakeholders
- Presented city information to local chambers and other community groups

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY – I-710 CORRIDOR PROJECT EIR/EIS, PROJECT MANAGER

- Managed public outreach for the environmental analysis, which included an extensive Health Risk Assessment
- Assisted in building public trust during Major Corridor Study by providing comprehensive information in multiple languages
- Coordinated public feedback about alternatives
- Worked closely with Metro and Caltrans District 7 staff to comply with regulatory environmental requirements and reports

METRO GOLD LINE FOOTHILL EXTENSION CONSTRUCTION AUTHORITY: GOLD LINE FOOTHILL EXTENSION PHASE 1B- PASADENA TO AZUSA, PROJECT MANAGER

- Maintain project schedule
- Manage Photo Documentation Team
- Updated constituent database
- Met with client on deliverable deadlines
- Responsible for project quality control and quality assurance
- Attend client/project meetings

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY – METRO GOLD LINE EASTSIDE EXTENSION, PROJECT MANAGER

- Research for parcel information of houses along extension
- Development of an impacted-community database
- Updated constituent database
- Met with client on deliverable deadlines
- Responsible for project quality control and quality assurance

RIVERSIDE COUNTY TRANSPORTATION COMMISSION (RCTC) – 40TH ANNIVERSARY VIDEO

- Managed the filming and collection of materials for production
- Oversaw all production for the final video product
- Coordinated and scripted all voice-over narration for the video
- Created an archivable library of video product to be used by RCTC at a later date

Elizabeth Michel II Project Manager



Education

B.S., Business Administration
Emphasis: Marketing
Minor in Psychology
Chapman University
Orange, Calif.

Semester Abroad, Fall 2013
Suffolk University
Madrid, Spain

Capabilities

Proven ability to handle meeting logistics and coordination

Collaborates with consultants, vendors, and in-house design studios to deliver tasks for complex projects

Organize, maintain and update databases in order to provide information that is accurate and easily accessible

Proficient with Microsoft Office, including Word, Excel and PowerPoint, and Adobe Acrobat, and web content creation

Years of Experience

3

Elizabeth brings a background of effective client and customer service experience to the table. She is motivated and highly organized, working effectively and efficiently to meet all deadlines. From the beginning of each project, she does extensive research until she understands everything. This allows her to effectively assist the project management team with all tasks throughout the life of a project. As Project Manager, Elizabeth is responsible for handling project-related tasks or activities, ensuring they are completed as requested.

Relevant Experience

CITY OF SEAL BEACH – 2018-2019 PIER REPAIRS, PROJECT MANAGER

- Create and lead comprehensive public outreach campaign regarding repairs to the City's pier
- Create detailed reports and provide updates to City departments and City Council on the project's progress
- Took part in creation and design of project website
- Plan and execute community events for project

CITY OF LONG BEACH – 2040 GENERAL PLAN UPDATE, DEPUTY PROJECT MANAGER

- Facilitate community outreach up to the review/approval of the General Plan
- Implement grassroots outreach including door to door noticing and phone banking
- Take part in creation and distribution of collateral materials
- Manage compiling all public comments into a comprehensive database
- Maintain and update stakeholder database

CITY OF LONG BEACH – CLIMATE ACTION ADAPTATION PLAN (CAAP), PROJECT MANAGER

- Develop effective Community Engagement Strategy as roadmap for public participation process and build project awareness
- Present technical information clearly to increase understanding
- Utilize technology during outreach events to maximize public participation
- Successfully created and executed phone banking campaign to raise awareness and encourage attendance for CAAP events

CALIFORNIA HIGH-SPEED RAIL AUTHORITY (CHSRA) – PALMDALE TO BURBANK SECTION, ACCOUNT COORDINATOR

- Direct the development of CHSRA's project deliverables and ensures they are aligned with and meet the project's goals
- Manages team strategy meetings to coordinate open houses and community outreach events
- Maintain internal stakeholder matrix for outreach efforts

City of Newport Beach

Community Engagement Related to a Future General Plan Update

- Facilitate the logistics for Community Open House Meetings, Community Working Groups, and Stakeholder Working Groups
- Contribute to the development of the Environmental Justice Outreach
- Provide formatting and quality control to technical reports and presentations

CALIFORNIA HIGH-SPEED RAIL – CONSTRUCTION PACKAGE 4 – COMMUNICATION SUPPORT DEVICES, ACCOUNT COORDINATOR

- Facilitate communication between project team to ensure a quick response, including a last-minute community outreach effort
- Develop weekly progress report to deliver regular updates and pertinent information to the project team
- Support community outreach efforts such as noticing, and community open houses
- Track expenses and progress report activities for monthly project billing

LOS ANGELES COUNTY DEPARTMENT OF PUBLIC WORKS – CONSOLIDATED CORRECTIONAL TREATMENT FACILITY, DEPUTY PROJECT MANAGER

- Management and development of collateral materials and project messaging
- Support the development of a Community Outreach Plan to guide outreach efforts with invested stakeholders and impacted areas
- Participate in project site tours to understand the impact of the project for messaging in collateral materials
- Facilitate logistics for community outreach efforts, stakeholder briefings, and grassroots outreach
- Port of Long Beach – Guidance Documents Integration, Deputy Project Manager
- Participate in bi-weekly team coordination calls
- Coordinate graphic design updates to the guidance documents
- Facilitate logistics in developing the web platform design

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY (METRO) – LINK UNION STATION (LINK US), ACCOUNT COORDINATOR

- Collaborate with planning of grassroots outreach
- Take part in assembly of collateral materials for outreach meetings
- Tracking of door-to-door outreach and document results
- Assist in the coordination of stakeholder mailings

Rachel Burkhardt || Account Coordinator



Education

B.A., Communication and Rhetorical Studies, Syracuse University

Syracuse, New York

Capabilities

Customer service

Direct Outreach

Written Communications

Social Media

Photography

Survey Distribution

Years of Experience

1

Rachel comes from a background in customer service and sports media. With a degree in Communication and Rhetorical Studies, she has a particular interest for the diverse communities throughout Southern California and how they interact. As a former NCAA Division I college athlete, Rachel was accustomed to balancing a full-time workload while dedicating extra hours each week to training. Since joining MBI, Rachel has displayed excellent communications skills and is currently the lead Account Coordinator on Metro's Long Range Transportation Plan.

Relevant Experience

LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY – LONG RANGE TRANSPORTATION PLAN (LRTP), ACCOUNT COORDINATOR

- Help provide outreach materials that are relatable to target audiences
- Assist in the creation and implementation of surveys and other project tools to help gauge LRTP opinions and outlooks
- Assist in reaching out to Metro's nine sub-regions throughout L.A. County
- Conduct grassroots community outreach at LRTP special events

LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY – FARE RESTRUCTURING SUPPORT STUDY, ACCOUNT COORDINATOR

- Assist Metro with the design, evaluation, and adoption of a new fare structure
- Supported Metro in conducting a rider survey to multiple bus and train lines
- Responsible for collecting and analyzing ridership information through direct outreach and survey services during peak traffic windows

METROLINK – ON-CALL OUTREACH SERVICES, ACCOUNT COORDINATOR

- Participate in door-to-door, grassroots outreach for Positive Train Control testing
- Assist with public noticing process throughout Southern California communities

CITY OF SEAL BEACH – 2018 SEAL BEACH PIER IMPROVEMENTS, ACCOUNT COORDINATOR

- Assist with direct outreach to citizens and visitors at special City events
- Help create and maintain project's social media facets, including drafting content for the project's Instagram page

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY – LINK UNION STATION (LINK US), ACCOUNT COORDINATOR

- Assist in preparation of stakeholder database for mailing and e-blasts
- Support Project Manager by conducting outreach at special Link US events

Reuben Garcia II Graphic Designer



Education

B.A., Web Design & Coding
Platt College
Ontario, Calif.

Capabilities

Skilled graphic designer
Website design and coding
3-D modeling and texturing
Photography
Skilled archivist
Software
InDesign
Illustrator
Photoshop
Dreamweaver
Flash
After Effects
HTML 5/JavaScript
PHP and MySQL

Years of Experience

14

Reuben is the graphic artist and information management specialist in charge of MBI's media repositories. He implements, organizes and maintains internal and client project libraries through the use of MBI's management system. Reuben has worked with project managers, IT staff, process owners and subject matter experts for a variety of clients. He has experience in digital libraries, graphic design, digital asset management, web design and coding, and records management. Reuben is a team player who understands the importance of managing today's resources for tomorrow's user.

AREAS OF EXPERTISE

- Creation of detailed infographics representing project stages
- Meticulous updating, designing and creation of detailed project maps showing alignments and alternatives
- Creating project templates for comment cards, fact sheets, and PowerPoint presentations
- Project branding and logo development
- Design and coding websites
- Design catalogs, flyers, advertisements, brochures, and RFPs
- Creation and sending of HTML email blasts
- Responsible for updating and enhancing MBI marketing materials
- Created and managed digital library capable of handling multiple document and multimedia formats for marketing and proposal support
- Optimized search through improved information architecture
- Implemented enhanced version control capabilities
- Photo documentation of construction projects
- Tagged and categorized images to be searchable via keywords and metadata
- Formatted and exported image documentation to client specifications

RELEVANT EXPERIENCE - GRAPHIC DESIGN, WEB AND PHOTOGRAPHY

- OCTA – I-405 Project
- Orange County Transportation Authority (OCTA) – 17th Street Grade Separation
- Metro – Long Range Transportation Plan
- Los Angeles Metropolitan Transportation Authority (Metro) – Link Union Station
- Metro – Emergency Security Operations Center
- Metro – SR-710 Study – Public Outreach & Facilitation of Community Participation
- Los Angeles County Department of Public Works – Consolidated Correctional Treatment Facility
- Metrolink – Van Nuys North Platform Project
- City of L.A. Department of Public Works – Proposition O Clean Water Bond Program: Albion Riverside Park, Coastal Interceptor Relief Sewer, Echo Park, Machado Lake, Penmar Park, Temescal Canyon Park, Wilmington Drain
- California High-Speed Rail Authority – Palmdale to Burbank Section
- Riverside County Transportation Commission (RCTC) – I-15 Express Lanes Project
- RCTC – SR-91 Corridor Improvements Project
- Santa Clara Valley Medical Center – Construction Documentation
- City of Long Beach – Long Beach Civic Center

Marcus Manley || Account Coordinator



Education

B.A., American Studies
Concentration on Race and
Representation in Media
University of California, Berkeley

Capabilities

Supports community outreach with
social media and other communications
platforms

Takes part in grassroots community
outreach support

Participates in canvassing and public
notification processes

Database Management

Years of Experience

2

Marcus comes from a background in customer service and sports media. With a degree in American Studies, he has a particular interest for the diverse communities throughout the Southern California region. Since joining MBI, Marcus has worked on multiple high-profile projects and has displayed excellent communication skills in dealing with the public and additional stakeholders.

Relevant Experience

CITY OF LONG BEACH – 2040 GENERAL PLAN UPDATE, ACCOUNT COORDINATOR

- Assisted with public meetings for City of Long Beach General Plan Community Workshop Meetings
- Participated in the creation and distribution of collateral materials
- Provided public outreach on behalf of the City of Long Beach
- Maintained and update stakeholder database

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY – LINK UNION STATION (LINK US), ACCOUNT COORDINATOR

- Assist with special event outreach, including developing logistics and event details
- Responsible for updating and maintaining the project's stakeholder database
- Coordinate with project team to maintain social media presence

CITY OF LONG BEACH – CLIMATE ACTION AND ADAPTATION PLAN, ACCOUNT COORDINATOR

- Developed social media content to engage users with sustainability tips, climate change facts, etc.
- Assist in preparation of internal stakeholder database

LOS ANGELES METROPOLITAN TRANSPORTATION AUTHORITY – LONG RANGE TRANSPORTATION PLAN (LRTP), ACCOUNT COORDINATOR

- Participate in outreach events throughout Metro's different sub-regions across L.A. County
- Distribute project surveys and explain project details/goals to public stakeholders
- Assist in the coordination and setup of LRTP booth at outreach events

LOS ANGELES COUNTY DEPARTMENT OF PUBLIC WORKS – CONSOLIDATED CORRECTIONAL TREATMENT FACILITY, ACCOUNT COORDINATOR

- Assist with the logistics for community outreach efforts, stakeholder briefings, and grassroots outreach

City of Newport Beach

Community Engagement Related to a Future General Plan Update

Marcus Manley || Account Coordinator



- Update the project team on relevant news articles and social media stories connected to the project
- Stay connected with community group activities and attend events

METROLINK – ON-CALL OUTREACH SERVICES, ACCOUNT COORDINATOR

- Participate in door-to-door grassroots outreach for Positive Train Control testing
- Assist preparation of internal stakeholder database for San Bernardino Line Improvement Plan

EXIDE TECHNOLOGIES – BLOOD LEAD SCREENING PROGRAM, ACCOUNT COORDINATOR

- Assist in the answering of the Exide Community Hotline
- Log calls and document questions and concerns
- Constantly update stakeholder database
- Fill out stakeholder request for documents
- Maintain internal stakeholder matrix for outreach efforts

Connie Mejia || Account Coordinator



Education

B.A., Communication Studies
B.A., Spanish Language
California State University, San Bernardino
Certificate, Spanish for Public Services
California State University, San Bernardino

Capabilities

Bilingual in Spanish
Community Outreach
Event Planning
Social Media
Marketing
Press Release Writing
Administrative Support

Years of Experience

2

Connie comes from a background in the non-profit and entertainment sectors. She has an appreciation for the dialogues that occur at local levels and recognizes the importance of community input. In the past, Connie has been responsible for executing diverse community events while successfully managing and balancing project budgets. Since joining MBI, Connie has shown initiative to become involved on multiple projects and has successfully provided Spanish translations for multiple clients.

Relevant Experience

LOS ANGELES COUNTY DEPARTMENT OF PUBLIC WORKS, EAST SAN GABRIEL VALLEY ACTIVE TRANSPORTATION PLAN, ACCOUNT COORDINATOR

- Conducts grassroots community outreach at special events
- Assists with direct outreach to citizens and visitors at special City events
- Distributes project surveys and explains project details and goals to public stakeholders
- Assists in the coordination and setup of booth at outreach events
- Database collected surveys from outreach events

CALIFORNIA HIGH-SPEED RAIL AUTHORITY (CHSRA), PALMDALE TO BURBANK SECTION, ACCOUNT COORDINATOR

- Responsible for updating and maintaining the project's stakeholder database
- Edits and formats Environmental and Engineering reports
- Provides Spanish translation for project collaterals
- Participates in project outreach meeting and develops meeting minutes

CITY OF SEAL BEACH – 2018 SEAL BEACH PIER IMPROVEMENTS, ACCOUNT COORDINATOR

- Helps create and maintain project's social media facets, including drafting content for the project's official Instagram page
- Assists in maintaining stakeholder database and social media comments and interactions

CITY OF LONG BEACH – CLIMATE ACTION AND ADAPTATION PLAN (CAAP), ACCOUNT COORDINATOR

- Assists with stakeholder engagement and public outreach planning
- Create extensive database of interactive feedback collected at special events

Staff Effort in Hours

Task #	Task Description	Factor (# of Months/Occurrences)	SR. Project Manager	Project Manager	Resource Project Manager	Account Coordinator II	Account Coordinator I	Graphic Design/Web Designer (Blended Rate)	Copy/Technical Writer	Total Hours
	Total Hours	Qty	199	332	75	212	334	116	19.5	1330.5
1	Consultant Familiarization with the General Plan		44	48	2	0	0	0	0	94
1.1	Review of current General Plan/Vision Statement		4	8	2					14
1.2	Understanding of required CA General Plan guidelines		8	8						16
1.3	Attendance of steering committee meetings	16	32	32						64
2	Community Engagement and Outreach Program Preparation		123	248	67	194	316	116	18.5	1121.5
2.1	Development of Outreach Program	1	8	24	8	8	8			57
2.2	Preparation and maintenance of webpage/portal	8 Months	4	8	4	2	4	32	4	58
2.3	Development of Educational Materials		8	24	4	8	8	24	4	80
2.4	Workshops – (7 planned in each Council District)	7	56	56	28	56	168	14	7	392
2.5	Individual Stakeholder Meetings	1	4	4	2	2	2	1	0.5	16.5
Innovative Methods for Participation										
2.6	Online Engagement - Virtual Meetings	1	8	8	1	8	4	8		38
2.7	Online Engagement - On-line Surveys	7	4	16	4	8	14	14		67
2.8	Online Engagment - Social Media	8 Months	2	8	2	16	8	2	1	39
Add	Videos & Written Testimonials	8	8	16	8	2	16	16		74
Add	Special Pop-Up Events	7	14	56	4	56	56	4	1	198
Add	Grassroots outreach for District Workshops/Events/Etc	7	7	28	2	28	28	1	1	102
3	Capturing Community Desires		32	36	6	18	18	0	1	115
3.1	Consensus Statement / Summary	1	8	8	2	2	2			23
3.2	Database of Information Collected	1	4	8		4	4			21
	Online Database Tool	8 Months	8	8	4	8	8			36
	Draft Outreach Program Summary	1	8	8		2	2		1	22
3.3	Final Outreach Program Summary	1	4	4		2	2			13
	Total		199	332	75	212	334	116	19.5	1330.5

PROPOSAL METHODOLOGY



As Californians, we take great pride in our social and ecological consciousness, doing our best to preserve our environment for future generations, often setting the standard for the rest of the nation. Reinforcing public awareness of projects, programs and initiatives that are designed to guide the growth and land development of communities allows them to establish goals and prepare for the future.

The Newport Beach General Plan is no different, with the City of Newport Beach (City) set to provide a long-range plan outlining the City's physical development. Although the current General Plan was adopted in 2006 and has been amended several times since, the time has come for a comprehensive update that will reflect changes that have occurred in the community's vision over the last 13 years.

In California, a typical general plan is composed of nine different factors, including: air quality, land use, housing, circulation, conservation, noise, safety, open space, and environmental justice. MBI specializes in facilitating community dialogue about complex issues. Managing outreach for a multitude of projects in various industries has taught us how to successfully implement public relations and community outreach plans that educate audiences, foster increased understanding, and encourage participation.

At the direction of the City, MBI will:

- Review and become acquainted with the current General Plan
- Develop a community engagement and outreach program with the assistance of the General Plan Update Steering Committee (Steering Committee) and City staff
- Engage and educate stakeholders and constituents about the General Plan and gather as much feedback as possible
- Record and document the community's questions, concerns, and suggestions

To maximize participation in outreach programs, MBI has also developed effective outreach tactics that include social media, translated collateral, door-to-door outreach with local stakeholders, and participating in community events to encompass communities large and small, contentious and exuberant, multicultural and multilingual.

MBI Representative

MBI Project Manager Elizabeth Michel will serve as the primary representative and will perform the services described in the Scope of Services. MBI Senior Project Manager Matthew Maldonado will serve as her alternate and will become the primary representative if Elizabeth is unable to continue with the project.

We understand that approval of either of them shall be at the Steering Committee's discretion. More detailed resumes of both have been included for reference in the Project Team section.

Familiarization with the General Plan

To ensure the accuracy of our approach, MBI staff will review and become familiar with the latest version of the Newport Beach General Plan—its elements, goals, and policies—in particular, the Vision Statement. As cities and counties across California develop and put into effect their own General Plans, they are helping to achieve statewide goals.

There are many factors to consider for long-range planning, such as increased migration from Asia and the Middle East, an increase in elderly and middle age residents, and how the rising population and its carbon footprint will influence the ever-growing impact of climate change.

Once thoroughly familiar with the current State requirements for General Plans and current guidelines, we will be in a position to highlight elements of the Newport Beach General Plan that need revision or improvement to adhere to State law.

As requested, MBI will attend all Steering Committee meetings throughout the process to observe, participate, and prepare detailed minutes.

Community Engagement and Outreach Program Preparation

.....

MBI will meet and work with the Steering Committee and City to discuss a variety of issues, including the preparation of the community engagement and outreach program (Outreach Program) and schedule, establishing program coordination procedures, and to learn about key planning objectives and issues.

We understand that the purpose of the Outreach Program is not to suggest ways the General Plan should be changed, but rather to creatively engage as many stakeholders as possible, encourage participation, and solicit as much feedback as possible. More to the point, we will emphasize areas of concern in the current General Plan and the Vision Statement. We will manage each task's scope and schedule, and designate assignments to highlight the strengths of the diverse and talented team that MBI has assembled for the project.

Our understanding and implementation of the scope of any project is most effective if we have strategic team and stakeholder database management. MBI uses Smartsheet, an online, cloud-based tool that has many uses, including facilitating the tracking of deadlines, tasks, and calendars, in a well-organized system that can be adapted as required for a variety of uses, including stakeholder contact management.

MBI will assist the City in showing Newport Beach residents and stakeholders that the agency is dedicated to community investments and building partnerships with community leaders and civic groups. Since it is critical to ensure a comprehensive stakeholder database is compiled prior to any outreach, MBI will work with the City to ensure the database is inclusive of key stakeholders, such as elected officials, agencies, chambers of commerce, community organizations, and residents, especially those most impacted by mobility barriers and who have been historically marginalized.

MBI has extensive experience in coordinating and planning various types of community meetings, including in-person, on-site, web-based and telephone. To achieve this, we will assist the City by implementing innovative communication tools to identify stakeholders, outreach areas, demographics, and language needs.



PROPOSAL METHODOLOGY



This will allow us to involve a wide range of stakeholders and encourage them to participate in meetings and program-related activities. The goal, as always, is to involve stakeholders and maximize the public's participation, stimulate discussion and encourage feedback from diverse stakeholders, being careful to identify local community concerns.

The MBI team is known to meet projects head on and develop solutions that are specific to the demographics of a region. Our team will coordinate with the City as special events or outreach opportunities come up and establish what key messages should be addressed. We will coordinate these special events and participate in staffing the events.

The Outreach Program will be geared in such a fashion that community members can:

- Learn about the current General Plan and make suggestions so it can be updated
- Examine and provide input on the existing General Plan Vision Statement
- Provide input on the various General Plan Elements, Goals and Policies contained therein that may be updated in the future to reflect a refreshed Vision Statement, emerging trends, and State law requirements

Elements of the Outreach Program

An Outreach Program can be elaborated as such that it will include:

- A public noticing and promotional strategy aimed at generating awareness for each program event or activity
 - This strategy will take into consideration communications with target audiences and stakeholders across multiple platforms, such as briefings, presentations, canvassing, mailings, web-based communications, social media and community outreach
 - Eblasts for workshops:
- Save the Dates – three rounds of notices to be sent
- Reminders – six rounds of notices to be sent
- Follow-ups for attendees – three rounds of notices to be sent



- Eblasts with information about the General Plan:
- Work with the City, Chamber of Commerce, and special interest groups to utilize their email databases
- Effective engagement with Newport Beach residents and stakeholders, or those that have been identified by City or Steering Committee
- High-quality written and visual communications that provide an overview of the Outreach Program's purpose, process and anticipated timeline in a manner that can be easily digested and understood by members of the public
- Maximized distribution of information to interested stakeholders

Workshop Strategies

With a minimum of seven visioning workshops scheduled—at least one in each Council District—gathering as much feedback from stakeholders is fundamental. In anticipation of the workshops, MBI has prepared a set of strategies, including:

- Stations labeled to encourage participation, such as:
 - Have your voice heard
 - What do you want your future Newport Beach to be?
- Tablets for stakeholders to utilize for online surveys via SurveyMonkey
- Comment cards for written statements that will be added to a comment database
- Listening workshops designed for all involved parties to listen to each other
- Interactive activities, such as:
 - Sticky dot tallying, where each colored dot has a different weight (blue = 5, yellow = 3, red = 1)
 - Monopoly Money to vote on goals most important to the community
 - Employing The Sketch Effect to add visualization to the summary report (www.thesketteffect.com)
 - Live polling

Grassroots Outreach

Relying entirely on digital-based media is not always the best way to reach all stakeholders, especially some long-term residents located within the region. This is where traditional outreach methods such as community meetings, neighborhood gatherings and piggybacking

on already established community events will help our team connect with many more stakeholders, including those that have yet to bridge the digital divide.

First, we must determine which events will be productive and constructive toward the goals of the General Plan. Collecting group email addresses and adding them to our stakeholder database will allow us to send periodic e-blast updates and inform stakeholders about upcoming activities, such as special pop-up events. Two examples of upcoming events that could be beneficial are the 16th Annual Art in the Park (September) and Concerts on the Green (August).

Special events such as these allow for an additional level of one-on-one interaction and allow us to grow our stakeholder database.

Furthermore, the grassroots outreach can be tailored to spotlight workshops in each Council District by way of:

- Flyer drops in designated areas
 - Flyers will include a link to the online survey
- Email outreach to local businesses
- Inserts included with utility bills
- Visit businesses and designated areas essential to outreach, dropping off flyers at these locations
 - Providing tablets to stakeholders so they can take the online survey

Online Engagement

When required, MBI will implement online engagement strategies, including meeting webcasts, podcasts, online surveys, webinars, discussion boards, and social media tools. We will build awareness about the General Plan and encourage conversations within target stakeholder audiences.

MBI can set up the following:

- Online surveys via SurveyMonkey with links to the survey posted on social media platforms and through City website blogs
 - For individuals that fall in the “technology divide” we suggest working with libraries and schools to give access to computers so that all stakeholders can participate in online surveys

PROPOSAL METHODOLOGY



- Virtual meetings – MBI can provide top-of-the-line live video streaming equipment to facilitate the set-up of live webinars that can be posted on the Project website
- Online comment forms through a dedicated webpage

The intention is to enhance distribution of information to stakeholders and offer an outlet for feedback while monitoring for misinformation that can go viral. To manage this process, we will develop implementation plans to guide the team on proper maintenance and usage of social media accounts (Instagram, Facebook, Twitter, YouTube, etc.).

In addition, MBI can establish and maintain a database of stakeholder involvement that contains survey results, meeting notes, comment summaries, and comments registered via emails, social media and other means of communication.

Social Media Implementation

MBI will also support the City by establishing a social media presence for Outreach Program-related activities

on Facebook, Twitter, Instagram, YouTube, and Snapchat. This social media strategy would include implementing consistent and constant posting across all social media platforms, enhancing the overall look of each social media account by uploading high-quality imagery and posting live webcasts of program activities, and the option of hosting online Q&As with various City representatives regarding the General Plan.

In addition, our team is prepared to assist the City with the creation of unique and innovative social media content such as utilizing the story feature on mediums such as Snapchat and Instagram to share outreach engagement activities and events with followers.

MBI shall maintain the established online platforms with up-to-date content to keep the public informed on the latest information, generate interest and grow the number of likes and followers. MBI is prepared to develop General Plan-specific digital engagement tools, as necessary, and will provide regular analytical measurements to monitor and document online activity on dedicated social media sites during key events.



City of Newport Beach

Community Engagement Related to a Future General Plan Update

Videos and Written Testimonials

We have decades of award-winning experience in reaching diverse audiences through informational videos and documentaries, which are crafted creatively and always tailored to the demographics of the community, to engage the public on a deeper visual level.

We can set up public testimonial videos, interviewing 20-40 Newport Beach residents during our grassroots outreach and presentations. We can also include written testimonials about diverse community concerns gathered at special interest group presentations or during grassroots outreach.

MBI has a full-service, in-house video studio and can provide a complete line of high-definition cameras to satisfy any video requirements. This includes Steadicam, broadcast-quality, and point-of-view cameras for mounting anywhere. We also have a full inventory of portable lighting kits and audio support gear to supplement our studio equipment.

We use Final Cut Pro and Adobe Premier, industry-standard professional video-editing software programs that accommodate all digital formats. We will sort, label and log all footage and create a rough-cut of the video, which will include a temp audio track, if needed. MBI has access to a full music library for final sound mixing.

Project Webpage

Before commencing the whole process, we will confer with the City to ensure that all development and design will be in conformance with their design or branding standards. In addition, MBI will make sure to coordinate with the City's communications staff regarding technical logistics, such as web hosting, testing and troubleshooting, post-launch maintenance, and archiving.

Our web designer will then visit websites that are user-friendly and "pull apart" and analyze them to determine what factors make them more accessible. If a client already has a website, he reviews the existing site to ascertain what factors need to be improved or added

or are difficult to find. At this step, it is also important to establish what the end user (visitor to the client's website) is looking to accomplish or learn with a visit to the website.

Based on the purpose of the website or that intended by the City, our web designer uses Adobe Photoshop or Illustrator to draft possible layouts for the website, making each one as comprehensible as possible. For example, he implements the use of infographics to break up the monotony of a wall of text. Employing a bright and captivating design makes a website more palatable to end users.

Once our web designer is done, he will offer three design compositions and request feedback from the City. Once the City approves a design, our web designer will begin the website buildout, using our standard program Adobe Dreamweaver, and implementing HTML5, jQuery, JavaScript, and CSS 3.

The website buildout is carried out on a testing site located on either the MBI server or the City's server, which ensures that the coding being used is compatible. During the buildout, careful consideration will be given to staying within the City's branding guidelines or themes. If desired by the City, the website can also include tracking and statistical tools, such as Google Analytics, Facebook pixels, and third-party advertising pixels.

Typically, four weeks (more or less) are allocated for the buildout. During that time, a sub-folder is used for testing, while a main/public folder is used for the live site.

If everything is approved, MBI will purchase a domain for the new website (unless the City is already in possession of one) and continue to manage the website for the City, posting updates as directed by the City.

In the case of a hand-off, provided the City already has a developer, MBI will package the files used and transfer them to the City. Otherwise, MBI will continue to manage the website for the City but add a content management system (CMS) that grants the City limited access to publish updates on the website.

Outreach Program Review and Approval

.....

We understand that the Outreach Program will need to be reviewed and approved by the Steering Committee prior to kickoff. Schedules will clearly outline all activities, their duration, and their relationship with other service requests.

To accomplish efficient and productive events for the City, we will also provide end-to-end management handling of all logistics, planning, volunteer recruitment, staff support, permits, event layout, rentals, partner recruitment, audio/visual and other coordinator roles. With the City's approval, MBI will:

- Arrange for meetings
- Prepare agendas, materials, content and speaking points for meetings
- Attend meetings as needed
- Develop notes and follow-up action items from meetings

In addition, MBI will maintain a record of stakeholder meetings/events/sign-in lists, as well as meeting notes and comment summaries.

With three decades of facilitating and managing outreach meetings and events, we have refined our approach to meeting logistics. As part of our public meeting protocol, we have established a checklist that ensures all materials needed are accounted for prior to, tracked during, and checked back in after each meeting. This mitigates the possibility of materials or items going missing, allowing the cost of materials needed for meetings to be managed appropriately.

Capturing Community Desires

.....

We specialize in reaching a diverse audience through a variety of communications methods, including PowerPoint presentations, informational videos and documentaries, which are crafted creatively and always tailored to the demographics of the community, to engage the public on a deeper visual level. Members of our project management team are well-versed and excel at public speaking and maintaining the

appropriate amount of decorum during presentations, as well as effectively handling disruptive behavior if necessary. MBI's goal is to work with the City to ensure a comfortable and engaging environment for the public that encourages participation.

MBI can establish public inquiry/response protocol, and maintain a record of stakeholder involvement, as well as meeting notes, comment summaries, and comments registered via phone calls and emails. We will also monitor social media platforms for comments and draft responses to comments.

MBI will submit a comprehensive report, including a complete overview of the Outreach Program efforts, with narrative documenting the community's comments and suggestions for change throughout the Listen and Learn process.

MBI will deliver to the City an accurate, organized resource that will be easy to understand and is structured in a manner that clearly chronicles:

- Detailed discussions with a consensus statement, summary of desired changes to the Vision Statement, and any other potential changes to the General Plan or issues to be addressed through other means
- Systematic record of all the voices and thoughts expressed
- Up-to-date, user-friendly online portal maintained throughout the project

MBI will present a draft of the report and corresponding information to the community at a Steering Committee meeting. MBI can deliver copies of all corresponding information, including email and social media communication logs and any other relevant documents to support the Outreach Program-related activities completed. MBI has produced these documentation reports in the past for other projects.

We understand that the Steering Committee may direct changes to the draft document and MBI will be responsible for producing a final document

City of Pasadena SRTS Proposed Work Schedule

[illegible]

PROPOSER EXPERIENCE



PROPOSER EXPERIENCE



2040 GENERAL PLAN – LAND USE AND URBAN DESIGN ELEMENTS

CLIENT

City of Long Beach

ROLE

Community Outreach

REFERENCE:

Christopher Koontz, Advance Planning Officer
333 West Ocean Blvd., 5th Floor
Long Beach, CA 90802
(562) 570-6288
christopher.koontz@longbeach.gov

APPROACH:

- Worked in cooperation with the City to maximize attendance at community workshops
- Tallied surveys and comment cards and provided a database for each
- Created a presentation providing assessment of survey results and comments provided
- Grassroots outreach included flyer drops in designated areas, phone and email outreach to businesses, and providing online surveys via iPads
- Collected written testimonials that included diverse community concerns
- Creation of collateral in Spanish and other languages
- Sent out e-blasts to provide noticing for the community workshops, a Planning Commission meeting, and information about the General Plan
- Attended presentation briefings
- Developed a media calendar
- Provided weekly updates on Facebook

SITUATION:

- In California, cities and counties are required by State law to have a General Plan
- A General Plan is a broad, long-range policy document that is the local government's long-term blueprint for future development.

- While State law requires Long Beach to update the General Plan, the City of Long Beach must also be prepared to manage industry changes and population growth.

CHALLENGE:

- California requires seven elements within the General Plan: Land Use, Circulations (Mobility), Housing, Conservation, Open Space, Noise, and Safety. The City has also adopted Scenic Routes, Public Safety, and Historic Preservation.
- The City is conducting numerous community engagement events regarding the Land Use and Urban Design Elements of the General Plan. These meetings and workshops provide valuable feedback from residents and business owners. The City plans to make important changes to the Plan based on this feedback.



City of Newport Beach

Community Engagement Related to a Future General Plan Update



LONG RANGE TRANSPORTATION PLAN (LRTP)

CLIENT

Los Angeles County Metropolitan Transportation Authority

ROLE

Public Outreach Consultant

REFERENCE:

Robert Calix, Senior Manager – Transportation Planning
1 Gateway Plaza
Los Angeles, CA 90012
(213) 922-5644
calixr@metro.net

APPROACH:

MBI has lead the information gathering and dissemination effort in coordination with Metro utilizing some of the following methods during the LRTP project:

- Project branding (Our Next LA Campaign)
- Grassroots outreach
- Public surveys
- Video interviews
- Special event coordination
- Website and Graphic design
- Collateral design and production
- Online engagement tool(s)
- Video and Photo imagery

SITUATION:

- Metro is required to comply with federal and state laws and develop a Long-Range Transportation Plan (LRTP)
- Metro dictates when the new plan will be set in place and made the decision to obtain input from the public about Metro transportation before concluding its new plan



- MBI is taking part in acquiring information needed for the transportation investments that are comprehensive and thoughtful

CHALLENGE:

MBI's involvement in the LRTP project presents the challenges associated with obtaining a large amount of information in a short period of time.

Los Angeles County has a growing population, with approximately 88 cities and 140 unincorporated areas. MBI has made it a mission to target as many cities and sub-regions as possible, including all nine of Metro's officially designated sub-regions within Los Angeles County.



PROPOSER EXPERIENCE



ON-CALL PUBLIC RELATIONS SERVICES

CLIENT

RCTC / Caltrans

ROLE

Public Outreach Consultant

REFERENCE:

Shannon Widor, Strategic Communications Officer – OC Public Works

300 N. Flower St.

Santa Ana, CA 92703

(714) 667-9759

shannon.widor@ocpw.ocgov.com

SITUATION:

- Orange County Public Works solicited the services of a qualified firm to provide on-call public relations services
- While recent reports on the state of Orange County's infrastructure place it above the national average, there is still work to be done
- Future improvements will make Orange County a leader in infrastructure quality

CHALLENGE:

It is vital to stress the importance and impact of infrastructure to the communities in the region. This would include encouraging stakeholders to stay informed on infrastructure issues through newsletters, newspapers, and online media.

It is also important to remind stakeholders of the importance of getting involved and supporting bonds and measures that would specifically work to improve the state of Orange County's infrastructure and meet the needs of the region.

The main goal is to show that community and stakeholder investment in infrastructure issues increases the quality of life for everyone.



PROJECTS:

Santa Ana River Homeless Encampment Removal

- MBI was asked to provide video documentation of the existing conditions and subsequent clearing of a large homeless encampment along the Santa Ana Riverbed, between Ball Road and Interstate 5 in Anaheim, Calif.
- Being a high-profile, sensitive issue, MBI worked alongside OC Public Works, OC Parks, Orange County Public Health Services, Orange County legal staff, and the Orange County Sheriff's Dept., Anaheim Police Dept., and Orange Police Dept.
- Documented the interaction of U.S. District Court Judge David O. Carter with homeless population along the riverbed
- The project is being observed by other agencies as a model for implementation of similar programs to deal with the issue of homelessness in their cities



City of Newport Beach

Community Engagement Related to a Future General Plan Update

PROPOSER EXPERIENCE



POSITIVE TRAIN CONTROL OUTREACH

CLIENT:

Orange County Transportation Authority

ROLE:

Public Outreach Consultant
Photo/Video Documentation

REFERENCE:

Noelle Afualo, Kleinfelder-Simon Wong Engineering
2280 Market St., #300
Riverside, CA 92501
(951) 972-2581
nafualo@kleinfelder.com

APPROACH:

- Photo documentation of existing conditions of specific areas, bridge structures, and building structures to be impacted by the project
- Photographic documentation of the project
- Designed photo archival library, which is currently maintained and updated

CHALLENGE:

The purpose of the proposed improvement is to improve travel conditions by increasing freeway capacity, improving traffic and interchange operations, and enhancing road safety to meet state and federal standards.

SITUATION:

- The San Diego Freeway (I-405) is one of the most congested freeways in Orange County, with more than 300,000 vehicle trips in some sections each day
- Traffic volumes on the I-405 are expected to increase significantly as the population is expected to grow 11 percent by 2040
- Caltrans, in cooperation with OCTA, is proposing to widen the I-405 between SR-73 and I-605



PROJECT HIGHLIGHTS:

- The Caltrans Project Development Team met on July 24, 2014 and OCTA was informed that Caltrans recommended building Alternative 3, using a phased approach
- OCTA is to construct one general-purpose lane on the I-405 in each direction between Euclid Street and the I-605



PROPOSER EXPERIENCE



SEAL BEACH PIER IMPROVEMENTS PROJECT

CLIENT:

City of Seal Beach

ROLE:

Community Outreach

REFERENCE:

Patrick Gallegos, Assistant City Manager
211 Eighth Street, Seal Beach, CA 90740
(562) 431-2527 Ext. 1308
PGallegos@sealbeachca.gov

David Spitz, P.E., QSD Associate Engineer
211 Eighth Street, Seal Beach, CA 90740
(562) 431-2527 Ext. 1331
DSpitz@sealbeachca.gov

APPROACH:

- MBI leads public outreach and any enquiries regarding the project
- Provides grassroots outreach for the Pier at civic & community events
- Created interactive project website for stakeholders to visit and follow progress
- Implemented Seal Beach Pier's first ever Instagram account to help keep the community informed of visual construction progress
- Creates and maintains project hotline number

SITUATION:

- In May 2016, an electrical fire damaged the end of the pier. Due to the fire, several small structures, utility infrastructure and charred portions of the pier were removed
- Additional structural and utility repairs were required, which included: replacement of fire damaged utility



lines, reinforcement and repair of damaged piles and pile caps, new stringers, decking and handrails

CHALLENGE:

- Major coastal construction projects like this one take many years of planning, designing, submitting for and receiving numerous state and federal permits, and obtaining environmental clearance
- The proposed project is to upgrade aged and damaged utility lines and restore structural stability of the Seal Beach Municipal Pier. The objective is to restore the City Pier for public use and access as well as prepare the end of the pier for a potential tenant



PROPOSER EXPERIENCE



CLIMATE ACTION AND ADAPTATION PLAN

CLIENT

City of Long Beach

ROLE

Community Outreach

REFERENCE:

Alison Spindler
333 West Ocean Blvd., 5th Floor
Long Beach, CA 90802
562.570.6946
alison.spindler@longbeach.gov

PROJECT GOALS:

- Implementation of mitigation and adaptation strategies
- Measurement and verification / monitoring project benefits
- Reporting
- Stakeholder engagement and public outreach
- Strategy development and evaluation

SITUATION:

- The City of Long Beach expressed its concern with the impacts of climate change, recognizing it will impact social, cultural and natural resources
- Long Beach wishes to be equipped to deal with the challenges of climate change and be prepared through sustainability planning
- Through the Climate Action and Adaptation Plan (CAAP), Long Beach aims to address climate change, meeting obligations while improving the quality of life and economic prospects of residents

CHALLENGE:

- As extreme climate events, such as heat waves, floods, fires, and droughts, are becoming more frequent and destructive, it is imperative that Long Beach prepare for such developments
- CAAP is meant to educate Long Beach residents about the challenges to come and to galvanize them to take an active role in the City's preparation for possible ecological crises, such as rising seas and eroding beaches and shorelines that will affect port operation areas, damaging property and affecting ecosystems



PROPOSER EXPERIENCE-REFERENCES



CITY OF LONG BEACH – 2040 GENERAL PLAN – LAND USE AND URBAN DESIGN ELEMENTS

MBI coordinated with the City of Long Beach to lead public outreach, public surveys, and numerous community engagement events regarding the Land Use and Urban Design Elements of their 2040 General Plan Update project. The City of Long Beach plans to make important changes to their updated General Plan based on the public's feedback that MBI gathered throughout this civic long-term planning project.

CONTACT:

Christopher Koontz, Advance Planning Officer
City of Long Beach
333 West Ocean Blvd., 5th Floor
Long Beach, CA 90802
(562) 570-6288
christopher.koontz@longbeach.gov



ORANGE COUNTY DEPARTMENT OF PUBLIC WORKS – ON-CALL PUBLIC RELATIONS

MBI has provided Orange County Public Works with on-call public relations services since 2017, including extensive outreach services to the DPW, such as mailings, public notices, and public meetings. We also put boots on the ground and provided successful video documentation throughout the highly publicized Santa Ana River Homeless Encampment Removal project, in 2018.

CONTACT:

Shannon Widor, Strategic Communications Officer
OC Public Works
300 N. Flower St.
Santa Ana, CA 92703
(714) 667-9759
shannon.widor@ocpw.ocgov.com



CITY OF SEAL BEACH – 2018-2019 PIER IMPROVEMENTS

In May 2016, an electrical fire damaged the end of Seal Beach's Municipal Pier. Due to the fire, several infrastructure fixtures had to be removed. The proposed project is to upgrade aged and damaged utility lines and restore structural stability of the Pier. MBI is currently leading all public outreach components of the project including pop-up events, the Pier's first ever Instagram page, as well as the creation and maintenance the project website: <http://sealbeachpier.org/index.php>

CONTACT:

Patrick Gallegos, Assistant City Manager
City of Seal Beach
211 Eighth St.,
Seal Beach, CA 90740
(562) 431-2527 Ext. 1308
pgallegos@sealbeachca.gov



LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY – LONG RANGE TRANSPORTATION PLAN

Metro dictates when a new Long Range Transportation Plan will be set in place and made the decision to obtain input from the public before concluding its new plan. Throughout the past 18 months, MBI has led outreach and worked closely with Metro's Planning and Design departments to help gather a large amount of information from all nine of their respective sub-regions of Los Angeles County. MBI has assisted Metro with project branding (Our Next LA Campaign), public surveys, grassroots outreach, and a brand-new online engagement tool where stakeholders can participate in the survey in more than 10 different languages. The goal of this project is to involve all stakeholders, through traditional and innovative digital outreach techniques. <https://ournext.la/>

CONTACT:

Robert Calix, Senior Manager – Transportation Planning/Communications
Metro
1 Gateway Plaza
Los Angeles, CA 90012
(213) 922-5644
calixr@metro.net

PROPOSAL ATTACHMENTS



ATTACHMENT A: STATEMENT OF COMPLIANCE

Instructions: Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

No Exceptions. The undersigned declares that the Proposal submitted by (Name of Firm) MBI Media to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.



Signature

4/26/19

Date

Mary McCormick - President & CEO

Printed Name and Title

Exceptions. By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) _____ has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

Signature

Date

Printed Name and Title

[Attach a separate sheet(s) detailing each exception being taken]

ATTACHMENT B: PROPOSER INFORMATION FORM

Instructions: Complete the form below and remit as part of your Proposal as Attachment B.

CONSULTANT INFORMATION

CONSULTANT/FIRM NAME: MBI Media

ADDRESS FOR NOTICES: 957 S. Village Oaks Dr.
Covina, CA 91724

MAIN CONTACT (NAME AND TITLE): Mary McCormick-Busse Title: President



CONTACT NUMBERS: TELEPHONE: (626) 967-1510 FAX: (626) 967-1718

E-MAIL ADDRESS: mary@mbimedia.com

FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

1. CONSULTANT AUTHORIZED SIGNATORY(IES):

	Mary McCormick-Busse	President	4/26/19
SIGNATURE	PRINT NAME	TITLE	DATE
	David R. Busse	Secretary	4/26/19
SIGNATURE	PRINT NAME	TITLE	DATE

2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:

- ☐ Proposer's Bylaws/ Operating Agreement Section _____ ☐ Copy Attached
- ☐ Board Resolution ☐ Copy Attached
- ☒ Corporations or Business and Professions Code**

**If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

IMPORTANT NOTE: If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:

PART 1: TECHNICAL PROPOSAL SECTION

SECTION A: PROPOSER BACKGROUND

☒ **COVER LETTER**

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bind the Proposer to contractual obligations.

☒ **ORGANIZATIONAL STRUCTURE**

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

SECTION B: METHODOLOGY

☒ **PROPOSAL – METHODOLOGY**

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.

☒ **ANTICIPATED WORK SCHEDULE**

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

SECTION C: PROPOSER EXPERIENCE

☒ **MINIMUM REQUIREMENT: EXPERIENCE**

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.

☒ **REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

SECTION D: PROPOSAL ATTACHMENTS

☒ **ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

☒ **ATTACHMENT B: PROPOSER INFORMATION FORM**

☒ **ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST**

☒ **OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

PART 2: COMPENSATION PROPOSAL SECTION

☒ **COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

SUBMISSION INSTRUCTIONS

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

(This page left intentionally blank.)



100 West Broadway, Suite 290
Long Beach, CA 90802
Phone: (562) 597-0205
E-mail: SGroner@SGAmarketing.com
Web : www.sgamarketing.com



COMMUNITY ENGAGEMENT RELATED TO A FUTURE GENERAL PLAN UPDATE

| CITY OF NEWPORT BEACH

TABLE OF CONTENTS

COVER LETTER	3
ORGANIZATIONAL STRUCTURE	4-13
METHODOLOGY	14-17
ANTICIPATED WORK SCHEDULE	18
SGA EXPERIENCE AND REFERENCES	19-30
PROPOSAL ATTACHMENTS	31-34

COVER LETTER

REF: RFP #19-69 – Community Engagement Related to a Future General Plan Update

Dear Selection Committee Members,

S. Groner Associates (SGA) is excited to submit our proposal in response to the City of Newport Beach's (City) Community Engagement Related to a Future General Plan Update RFP. With two decades of strategic planning and meeting facilitation experience, we have the range of skills and expertise to perform the work as stipulated in the RFP.

Founded in 1998, SGA is a full-service strategic marketing, outreach, and communication firm with an emphasis on community issues and engagement. We have a long, proud history of cooperatively working side-by-side with many government agencies and community-based organizations. We have assisted with the development and implementation of strategic plans, community outreach, and education programs to address environmental, community and policies issues on behalf of cities, counties, the State of California, non-profit organizations, and the federal government.

For this proposal, SGA can facilitate community meetings, direct the collaboration among contributors, and finally organize the findings in a comprehensive report. In our experience facilitating meetings, incorporating feedback, and composing reports, SGA has learned that it is a process, not an event. A key element in the effort is developing a structured and fair process that allows for the contribution and recommendations from all residents and community members. This coordination helps build commitment, provides insight into issues, challenges, concerns, and opportunities which may not have been known or fully understood, and finally, ensures their "buy-in" to help execute the strategies.

SGA can help the City establish a clear and meaningful strategic planning process and engage all stakeholders to ensure success. The end product will allow the City to incorporate the community feedback in updating the existing General Plan including its Vision Statement, as well as its goals and policies.

Sincerely,



Stephen Groner, President SGA

ORGANIZATIONAL STRUCTURE

Prior to starting SGA, Stephen Groner worked for the Los Angeles County Department of Public Works as a Project Manager. This experience gives SGA keen insight into understanding the intricacies of government mandates and requirements, as well as the importance of public engagement and education. Gaining public approval and acceptance of a project is crucial to its success. For over 20 years, Stephen has helped shape and implement many outreach plans for various public agencies throughout California. For this project, Stephen would direct the project and use his experience to recommend specific marketing tactics to increase community engagement and awareness. Stephen would also ensure that deliverables are executed thoroughly and that expectations are met.

For this project, Erica Mahgerefteh will be the Strategic Director. Erica has been developing and implementing strategic plans for SGA since 2006. She will work closely with the City to develop a Strategic Outreach Program. Erica recently developed a Three-Year Strategic Plan for Riverside County to increase community participation and to develop one cohesive voice for the County's Public Education Program. Within the past year in Orange County, she developed a communication and outreach recommendations report for the Children and Families Commission of Orange County (FIRST 5 OC) and an audience assessment for the Transportation Corridor Agencies. Erica will combine her strategic planning experience to develop an Outreach Program that will increase awareness while encouraging community participation.

To manage the implementation of the marketing strategies, SGA is designating Carolina Gonzales as the Project Manager. Carolina previously managed the public education and outreach program for the Orange County Stormwater Program and is currently managing the public education and outreach effort for Riverside and San Bernardino Counties. She is also managing the implementation of the communication strategies for the Transportation Corridor Agencies. She will maintain close communication with City staff to ensure all deliverables are achieved successfully.



STEPHEN GRONER, P.E.

Project Director

Strategy



Management



Leadership

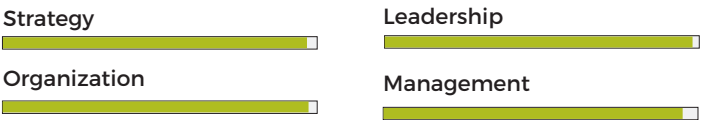


Communication



Stephen is the president of SGA, founding the firm after serving as a program manager for the Los Angeles County Department of Public Works. As a frequent presenter and keynote speaker at national conferences, Stephen is well versed in delivering an effective presentation or facilitating a productive conversation. Since many of SGA's clients, such as the regional stormwater programs for the Counties of San Bernardino, Orange, and Riverside, are multi-agency programs representing a range of cities, counties and stakeholders, Stephen has used his facilitation skills to achieve consensus and agreement often among competing goals, interests, and resources. In directing these meetings, Stephen has used his facilitation skills to get diverse stakeholders to agree on work plans, timelines, and goals.

ERICA MAHGEREFTEH, MPH
Strategic Director



As the Strategic Director, Erica has over 15 years of experience developing strategic work plans for projects, leading staff to execute tactics, serving as the direct point of contact with clients and managing contract budgets. With a Master of Public Health degree from UCLA, Erica has extensive experience managing and assisting over a dozen contracts related to strategic planning. Her recent project experience includes working with the Thermostat Recycling Corporation to remove toxic mercury from the environment, assessing the communication strategy and recommending improvements for the Children Family Commission of Orange County, and advertising and outreach campaign to curb the consumption of sugary beverages among Latino communities in Santa Clara County.

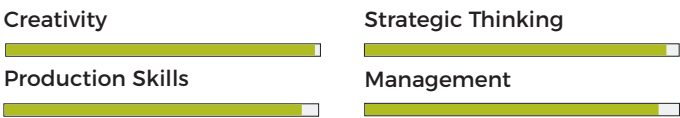


CAROLINA GONZALEZ
Project Manager



Carolina has experience in media relations, public education, community outreach, and campaign development. Before working at SGA, Carolina was the communications officer and official spokesperson for American Civil Liberties Union of Florida. She launched campaigns that reached media outlets, government officials and the public, one resulting in a bi-weekly Telemundo TV segment. She was the co-founder and co-director of Esperanza Venezuela Foundation, an organization that raised awareness about street violence in Venezuela through art.

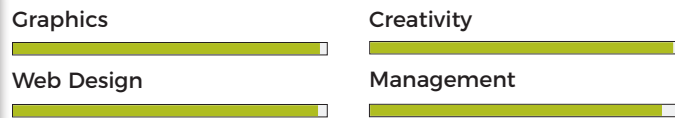
LY NGUYEN, MFA
Creative Strategist



Ly is an experienced creative director with traditional and digital advertising experience focusing on increasing engagement and client awareness. He has been developed and produced various creative assets for the City of Los Angeles Stormwater Program, the City of Irvine, San Bernardino Stormwater Program and the San Mateo County Water Pollution Prevention Program.



MARY GAMBOA,
Sr Graphic Designer, Web Developer



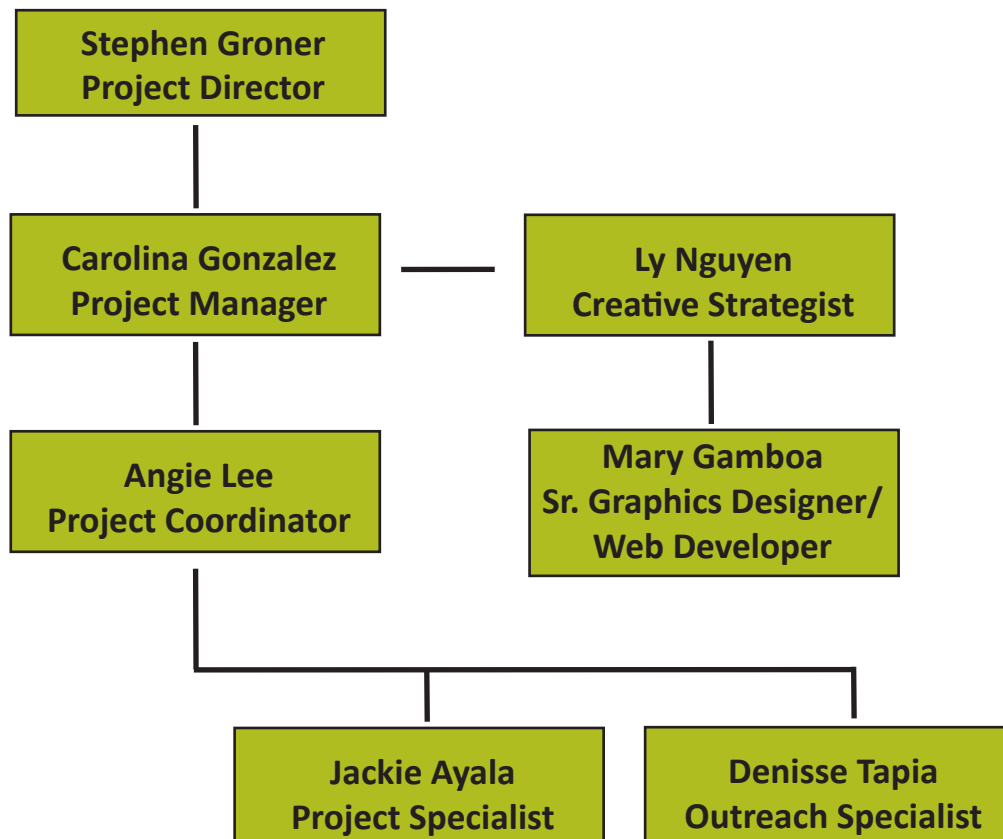
Mary has developed more than two dozen websites for clients in the last few years and has managed website designed with CSS3, HTML5, MySQL, Javascript, Wordpress, Joomla!, Drupal, and PHP. In addition, Mary is an experienced graphic designer and layout specialist who has worked on numerous brochures, flyers, and mailers for many of our clients.



ANGIE LEE, SGA
Project Coordinator



Angie is a project specialist with experience on a variety of marketing projects and community outreach. Angie has coordinated and assisted with the public engagement, community outreach, and creative development of communication collateral for the City of Irvine, Riverside County, San Bernardino County and Orange County.



PROPOSED STAFF HOURS

Community Engagement General Plan Update_City of Newport Beach									
S. Groner Associates									
PROPOSED STAFF	Stephen Groner	Erica Mahgerefteh	Carolina Gonzalez	Ly Nguyen	Angie Lee	Mary Gamboa	Jackie Ayala	Denisse Tapia	
JOB FUNCTION	Project Director	Strategic Director	Project Manager	Creative Director	Project Coordinator	Sr. Graphic/ Web Designer	Project Specialist	Outreach Specialist	
DELIVERABLES	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	HOURS	TOTAL HOURS
TASK 1: FAMILIARIZATION GENERAL PLAN									
Pre-Project strategy planning		2	2		2				6
Kick off meeting with City	4	4	4		4				16
Conduct situational analysis, interview City and stakeholders	2	12	4		8				26
Review and research General Plan, Vision Statement, State requirements	2	10	8		4				24
Develop work plan and finalize schedule			8		4				12
Attend Steering Committee meetings (cost per meeting)	12		2		4		2		20
Hours	20	28	28	0	26	0	2	0	104
TASK 2. COMMUNITY ENGAGEMENT AND OUTREACH PROGRAM									
Develop Outreach Program plan and schedule		12	8		4				24
Preparation and maintenance of an interactive online webpage/portal			8	2	4	20	8		42
Develop appropriate user-friendly educational materials*			4	8	6	14			32
Facilitate visioning workshop (cost per workshop)	16		4	4			8	4	36
Facilitate individual stakeholder meeting (cost per meeting)	16		4	4			8	4	36
Develop digital and social media engagement			16	8	20		12	8	64
Develop and maintain interactive text messaging platforms			12	4	10		18		44
Develop and mail out Meeting-in-a Box			8	4	4	12		6	34
Hours	32	12	64	34	48	46	54	22	312
TASK 3. CAPTURING COMMUNITY DESIRES									
Draft Community Input Guide to Steering Committee	8	20	10		8	4			50
Finalize Community Input Guide	4	8	4		2				18
Hours	12	28	14	0	10	4	0	0	68
MONITORING AND EVALUATION									
Continuously monitor, refine and adapt outreach strategies	8		25		16		10		59
Produce reports, tabulations and assessments		8	16		24			10	58
Hours	8	8	41	0	40	0	10	10	117
Total Project Hours	72	76	147	34	124	50	66	32	601



STEPHEN GRONER, P.E.

PRESIDENT/PROJECT DIRECTOR



EDUCATION

B.S. in Civil Engineering and
Environmental Engineering
University of Wisconsin

California Registered Civil Engineer
Certificate Number 50884

EXPERIENCE

SUMMARY:

- 25 years water quality issues
- 20 years communication strategy

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Founder, President, 1998 – Present

LA County Dept. of Public Works,
Environmental Affairs
Program Manager, 1989 – 1998

SKILLSET

Strategy



Management



Leadership



Communication



ABOUT STEPHEN

Stephen Groner is the founder and president of S. Groner Associates, Inc., a communications consulting firm specializing in community outreach and environmental education. Stephen has more than 25 years of public and private sector experience, formerly as a manager for Los Angeles County Public Works and then as a consultant to municipal, state and federal agencies. Through his work, Groner has helped shape and implement many of the major pollution prevention and community outreach programs in Southern California over the past decade.

RELATED PROJECT EXPERIENCE

EPA FISH CONTAMINATION EDUCATION COLLABORATIVE

Stephen directed the fish contamination education collaborative for the US Environmental Protection Agency, which in 2010 won the national PR industry award for best community service campaign in the country (PRSA Silver Anvil)

STATEWIDE PLASTICS DEBRIS PROJECT

Stephen served on the advisory board for the Statewide Plastics Debris Project a joint project sponsored by the State Water Resources Control Board, the California Coastal Commission, the Algalita Marine Research Foundation, and the H. John Heinz Center for Science, Economics, and the Environment.

SANTA MONICA BAY

Stephen chaired the Santa Monica Bay regional task force to address water quality issues from wastewater treatment systems in the northern Santa Monica Bay. The task force included stakeholders from the State, County, and local officials in addition to environmental groups and community leaders. The task force released its recommendations and was able to obtain a State grant of approximately \$1 million to implement its key recommendations.

STATE WATER RESOURCES CONTROL BOARD

Stephen participated as a part of a stakeholder group assisting the State Water Resources Control Board on the development of regulations for AB 885, addressing on-site wastewater management statewide.

STATEWIDE STORMWATER TASKFORCE

Stephen served as chair of the Statewide Storm Water Taskforce Committee on Public Involvement and Public Participation, a program that helped coordinate public education efforts Statewide on water quality issues.

WORKSHOPS AND SPEAKING ENGAGEMENT

Collaborated with Professor P. Wesley Schultz to conduct workshops on outreach and behavior change for local municipalities across the State and country sponsored by CalRecycle on the west coast and on the east coast by US EPA's superfund program.



ERICA MAHGERFTEH, MPH

STRATEGIC DIRECTOR



EDUCATION

Master of Public Health in Community Health Sciences
UCLA Fielding School of Public Health
2017

Bachelor of Arts in Communication
USC Annenberg School for Communication & Journalism

EXPERIENCE

SUMMARY:

- 12 years community engagement experience
- 12 years project management experience

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Strategic Director, 2006 – Present

Health Services Advisory Group
2013 - 2015

SKILLSET

Management



Communication



Leadership



Strategic Planning



ABOUT ERICA

As a Strategic Director, Erica is called upon to set the strategy and work plans for projects, negotiate contracts, lead a team of staff to execute tactics, serve as the direct point of contact with the client and manage contract budgets. She has extensive experience managing and assisting over a dozen contracts related to marketing and public outreach. Erica also has a Master in Public Health in Community Health Sciences. She aims to create behavioral and community health campaigns to tackle current and emerging public health issues.

RELATED PROJECT EXPERIENCE

DEPARTMENT OF PUBLIC HEALTH SANTA CLARA COUNTY

The Department of Public Health of Santa Clara County has embarked on a campaign to reduce the consumption of sugary beverages among Latino communities in Santa Clara. For this advertising and community outreach campaign, Erica is working with a local community organization (SOMOS Mayfair) to increase awareness of the health issues and to also deter families from consuming too many sugary beverages.

CHILDREN AND FAMILIES COMMISSION OF ORANGE COUNTY

Erica led the SGA team for a strategic communications assessment and development of a framework plan. She conducted an assessment of the current communications programs and activities. Afterwards, she provided an objective and efficient review and analysis of the Commission's current communications strategies and content. She also provided insight and recommendations for a communications plan that focuses on policy and advocacy issues that support the goal that all children are healthy and ready to learn when they enter school.

HEALTH SERVICES ADVISORY GROUP

Erica was nominated as the communication team's representative in companywide strategic planning sessions. She ensured documentation and reporting was done in accordance with the Centers for Medicare & Medicaid Services (CMS) contract requirements. She developed a tool that CMS deemed a best practice - marketing personas of seniors with chronic conditions (e.g., heart disease, diabetes) to assist healthcare professionals in connecting with these audiences. She also conducted an audience analysis of Medicare-aged residents in anticipation of a community health fair to identify topic areas that were critical in helping to reduce health disparities.



CAROLINA GONZÁLEZ

PROJECT MANAGER



EDUCATION

B.A. in Mass Communications
Universidad Catolica Andres Bello,
Caracas. Venezuela

Associate Degree in Arts Miami Dade
College

EXPERIENCE

SUMMARY:

- 10 years media relation experience
- 9 years project management experience

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Project Manager, 2015 – Present

American Civil Liberties Union of Florida
Communications Officer 2012 - 2015

SKILLSET

Management



Communication



Leadership



Social Media



ABOUT CAROLINA

Carolina is a project manager with extensive experience in media relations, public education, community awareness, and campaign development. She is also a native Spanish speaker using her bilingual abilities to conduct successful outreach to the Latino community. She was the co-founder and co-director of Esperanza Venezuela Foundation, an organization that raised awareness about street violence in Venezuela through art. Before working at SGA, González was the communications officer and official spokesperson for American Civil Liberties Union of Florida.

RELATED PROJECT EXPERIENCE

LOS ANGELES COUNTY CLEARWATER TUNNEL PROJECT

In 2012, the Los Angeles County Sanitation Districts' (Sanitation Districts) Board of Directors approved the Clearwater Project. The Project consists of the construction of a new tunnel to protect public health and the environment. Carolina manages the project's community and stakeholder outreach. She develops strategic action plans to successfully engage residents and businesses along the construction route by promoting the project's benefits.

CITY OF IRVINE ENVIRONMENTAL PROGRAMS

Carolina manages all the community outreach and public education efforts for the City of Irvine Environmental Programs. She has developed a wide array of award-winning projects for the City ranging from solid waste reduction to energy conservation. To increase community engagement and buy-in for the actions, ordinances, and resolutions that the City developed and implemented, SGA utilized a mix of solutions ranging from web-based tactics to media relations to traditional outreach techniques.

PAINTCARE RECYCLING CAMPAIGN - LATINO

Carolina managed the implementation of two Paintcare pilot programs in Los Angeles. She conducted outreach to the local Latino communities across a range of media platforms in Spanish and encouraged the recycling of used paint materials through awareness and education. As part of this effort, she produced Spanish videos to effectively communicate with residents in a manner that could relate to: family, safety and neighborhood commitment.

SAN BERNARDINO COUNTY PUBLIC EDUCATION

Carolina coordinates public outreach and media efforts for San Bernardino County's Pet Waste Campaign which encourages residents to properly dispose of dog wastes to prevent stormwater pollution. She also redesigned the County's website and has developed numerous public education outreach material for San Bernardino County's Household Hazardous Waste sector.



LY NGUYEN, MFA

CREATIVE STRATEGIST



EDUCATION

MFA, Creative Writing
Goucher College, MA

B.S., Biology
Loyola University, LA

EXPERIENCE

SUMMARY:

- 12 years marketing and communications experience
- 8 years Creative Director

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Sr. Project Coordinator, 2016 – Present

Omni Advertising
Creative Director 2012 – 2016

SKILLSET

Creative Concepts



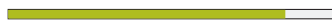
Production



Writing



Management



ABOUT LY

Ly has a strong advertising and marketing background with a proven track record of success as a Creative Strategist. He has developed original ideas and concepts and convert those concepts into fully conceptualized print, TV, radio and digital campaigns. He deftly combines creative strategies with sound metrics and analytics to create innovative marketing strategies. His audio and video production experience allows him to efficiently organize and direct commercial shoots and production.

RELATED PROJECT EXPERIENCE

CLEARWATER TUNNEL PROJECT

In 2012, the Los Angeles County Sanitation Districts' (Sanitation Districts) Board of Directors approved the Clearwater Project. The Project consists of the construction of a new tunnel to protect public health and the environment. Ly helped develop the outreach strategy as well as designing and formatting the final Short Term Outreach Plan.

CITY OF IRVINE ENVIRONMENTAL PROGRAMS

Ly has developed successful, multifaceted marketing outreach materials for the City targeting residents and businesses. The messaging was focused on developing awareness of the program's goals and on building engagement. Ly wrote and helped design brochures and mailers. He also wrote and produced an infographic video to promote the City's effort to help business with recycling organic wastes.

CITY OF LOS ANGELES STORMWATER PROGRAM

Ly helped develop the creative social media messaging and strategy for LA Stormwater's Watershed Moment project. He also helped guide the production of short videos aimed at residents to realize their "watershed" moments so that they can change their pollution causing behavior.

SAN MATEO COUNTYWIDE WATER POLLUTION PREVENTION PROGRAM

Ly composes educational blog articles and press releases to help San Mateo County agencies, businesses, and residents keep stormwater runoff clean and to reduce environmental impacts to neighborhoods, creeks, the Bay, and the ocean.

CITY OF SANTA MONICA

Ly helped the City craft a school outreach program to teach elementary, middle and high school students about stormwater pollution and prevention utilizing assembly presentations, new teaching curriculum and revamped educational website.



MARY GAMBOA

SR. GRAPHIC AND WEBSITE DESIGNER



EDUCATION

B.A. in Studio Art, Minor in Digital Art,
University of California, Irvine

EXPERIENCE

SUMMARY:

- 8 years graphic design and layout
- 10 years web design
- 12 years marketing

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Sr. Graphic/Web Designer
2010 – Present

Threeink Design
Freelance Graphic and Web Designer,
2008 – 2010

SKILLSET

Graphics



Web Design



Creativity



Management



ABOUT MARY

Mary Gamboa has more than 10 years' experience developing innovative graphic designs, websites, and visual marketing solutions. Mary is an experienced graphic designer and layout specialist who developed and managed the visual designs for both the *Be the Street* and Los Anglers campaigns. She successfully developed the Green Business logo for the US Zero Waste Business Council. She was responsible for creating and designing the websites for Riverside County Stormwater Program and Clearwater Tunnel Project.

RELATED PROJECT EXPERIENCE

LOS ANGELES HOUSING & COMMUNITY INVESTMENT DEPARTMENT (HCIDLA)

Mary designed and developed the complete rebranding of all materials for HCIDLA. Initially beginning with their core logo, Mary subsequently developed distinct images for each of HCIDLA's sub programs and rebranded all materials, brochures, and letterheads to ensure a coherent feel to their programs.

BE THE STREET

Mary was the lead designer for this innovative and visual campaign. Created in partnership with the Bay Area Stormwater Management Agencies Association (BASMAA), Be the Street was a litter abatement program targeted at Bay Area youth. The campaign relied heavily on branding and images so that the different aspects of the campaign (online, offline, Facebook, events, etc.) were all immediately recognizable. *Be the Street* won the 2014 CASQA award for Best Stormwater Outreach program.

US ZERO WASTE BUSINESS COUNCIL

Mary developed the logo for Green Businesses recognized by the US Zero Waste Business Council. This logo recognizes companies that produce products with net-zero waste during production. The logo was created in consultation with partners from Disney, Whole Foods, Sierra Nevada Beer, and other nationwide brands.

UNITED STATES EPA AND FISH CONTAMINATION EDUCATION

Mary developed numerous branded materials for a range of FECE programs including the Los Anglers brand, contamination tip cards, FCEC logo, and fliers and poster promoting annual events. Collectively, the cohesive branding allowed the range of programmatic pieces to come together into an effective, overarching program that addressed the human health risk posed by the Palos Verdes Superfund site.

DIRECT BRANDING

Mary manages and maintains SGA's internal web design and marketing materials. As manager, Gamboa sets the creative visual direction and tone.



ANGIE LEE

PROJECT COORDINATOR



EDUCATION

B.A. in Environmental Policy
University of California San Diego

EXPERIENCE

SUMMARY:

- 5 years social media experience
- 4 years marketing and communications experience

WORK HISTORY:

S. Groner Associates, Inc. (SGA)
Sr. Project Coordinator, 2015 – Present

UCSD Procurement & Contracts Small
Business Sustainability
Intern, 2013 – 2014

SKILLSET

Social Media



Planning/Organizing



Digital Outreach



Communication



ABOUT ANGIE

Angie is a marketing professional with tremendous experience in online marketing and outreach coordination. From social media to video production to community meetings, she possesses the skillset to help SGA's clients successfully communicate and engage with their stakeholders. Before working at SGA, Angie worked for her alma mater, UCSD, in their Procurement and Contract department and wrote grants for Plant with Purpose, a nonprofit organization focused on reversing deforestation and poverty around the world.

RELATED PROJECT EXPERIENCE

CITY OF LOS ANGELES SANITATION FOOD WASTE DIVERSION PILOT PROGRAM

In order to increase landfill diversion, LASAN is conducting several pilots for the diversion of food waste. One of these programs is the residential food waste in-sink disposal pilot program. Angie coordinates the survey and outreach effort for over 500 Westchester residents to gauge interest regarding the food waste diversion pilot program. She is also responsible for coordinating community events for resident pilot participants.

SAN BERNARDINO COUNTY PUBLIC EDUCATION

Angie helped coordinate the rebranding of the County's stormwater campaign and all promotional materials relating to the "Where water meets community" campaign. She also contributed to the new website design. In addition to these project duties, she is responsible for organizing all outreach efforts for the pet waste and Household Hazardous Waste campaigns. Angie also handles the County's social media account. With her help, the County's Facebook followers has grown to over 14,000.

CITY OF LOS ANGELES STORMWATER PROGRAM

Angie is responsible for organizing and training SGA's Outreach Specialists to help promote stormwater awareness during multiple community events in Los Angeles. She also organizes LA's Kid's Ocean Day which brings together over 2000 students and teachers to bring awareness of how stormwater pollution can harm our oceans. To help promote the event, Angie developed the social media content and organized media coverage.

CITY OF IRVINE ENVIRONMENTAL PROGRAMS

Angie has worked on multiple public education and community awareness campaigns for the City ranging from energy conservation to recycling organic material to services the City offers for its senior residents. On all these campaigns, she has coordinated and oversaw the development and execution of all digital and print materials.

ORANGE COUNTY PUBLIC WORKS

Angie helped coordinate the reconstruction of the Department's old campus infrastructure to a greener and more environmentally-friendly infrastructure. She also worked with engineers to create easily accessible and understandable informational signage to inform public of the changes when they come for the campus tours.

Task 1. Consultant Familiarization with the General Plan

Before SGA develops any community engagement and outreach strategies, we will invest time and effort to review and become familiar with the City's current General Plan, the Vision statement, and current State requirements to provide opportunities for the involvement of the community.

In addition to this research, SGA will also spend time understanding the City's current public engagement efforts in terms of the General Plan. We will conduct a background and situational analysis. The situational analysis will take a snapshot view of the City's communication efforts and find out where things stand. This analysis can help us understand the context for the City's public engagement and identify the strategic goals we will work toward. The information gathered will be used to:

- Look at the wider context of the City's outreach efforts, what is driving it, and what it needs to achieve
- Review the actions currently undertaken to meet the General Plan Update's targets
- Identify what we need to do and by when

We will conduct a series of interviews with elected officials, city staff, and neighborhood leaders to provide insight on the public engagement process, including the best times and locations to hold meetings, contact information for key stakeholder groups that should be involved in the process, and key issues that are likely to be important within the community. We will ask questions like these:

1. What are the City's strongest assets?
2. What are its current challenges?
3. When should we hold public meetings (time of day/day of week) to maximize involvement (recognizing this may be different in each neighborhood)?
4. Where should we hold public meetings (note: we will be conducting citywide meetings)?
5. Do you maintain any email distribution or contact lists?
6. Who are other key stakeholders we should be speaking to directly as part of this community engagement?
7. Are there any issues the consultant team should be aware of before conducting the community engagement?

This first stage is important because it will give us the factual evidence we need to develop the City's engagement strategy, provide baseline information from which we can set targets, and help direct the budget to the area with the most return on investments.

SGA also has the capabilities to attend and record notes and crucial findings at all Steering Committee meetings. As needed by the City, we can compile these notes into user-friendly reports.

Task 2. Community Engagement and Outreach Program Preparation

SGA recognizes that including community feedback and input are critical components of the City's

General Plan Update process. Providing the opportunity for public input encourages residents to be invested in the future of their community and helps ensure that recommendations developed as part of the General Plan Update are implemented and sustained over time.

Based on City staff input, SGA will prepare a tailored Community Engagement and Outreach Program (Outreach Program) with the goal of reaching the whole community through a range of outreach methods and activities. The Outreach Program will:

- Introduce the overall outreach process and engagement tools;
- Discuss outreach goals as well as lessons learned through previous engagement efforts by the City;
- Review the proposed activities and methods for engagement, communications responsibilities, and the schedule of outreach activities in relation to key dates, meeting cycles for official bodies (e.g. Planning Commission, City Council, interdepartmental staff meetings, etc.) and events in the community;
- Review and refine the list of interest groups, stakeholders, key advisors, and the format of future community meetings;
- Establish methods for communicating with City staff and stakeholders.

The goals and objectives of the Outreach Program are:

- To engage and empower community members in the visioning and planning process for their community.
- To build capacity in the community so that the community can guide and support implementation of the updates for the General Plan for the next generation of Newport residents.
- To achieve broad demographic and geographic representation from community members and other stakeholders.
- To achieve an end product that has community support and ownership because community members feel that their voice has been heard
- To engage the community in a planning process that results in sustainable recommendations after a new general plan is adopted.
- To involve stakeholders and the general public at key points with interactive participation that ranges from one-on-one activities, to informed committees and to large scale community meetings and activities.
- To develop easily understood informational materials that are language and culturally appropriate.

In our proposed Outreach Program, SGA will reach out to various targeted stakeholder groups throughout the City using a variety of outreach activities to engage and inform the entire community. Community members will have a chance to share information, gather feedback, and have a meaningful role in shaping the future vision for the City of Newport Beach. Feedback and input received as part of a city-wide outreach effort will be incorporated into a comprehensive report and supplied to the City.

We will include the following tactics as listed in the RFP:

- Preparation and maintenance of an interactive online webpage/portal.
- Develop appropriate user-friendly educational materials.

- Facilitate a minimum of seven visioning workshops, at least one in each Council District.
- Facilitate individual stakeholder meetings, as required.
- Develop digital engagement such as virtual town hall meetings, citywide and neighborhood-centric on-line surveys, and use of various social media platforms.
- Develop a schedule for implementation of the Outreach Program.

We have also proposed several innovative methods of driving active participation from the community:

INTERACTIVE TEXT

Interactive text messaging platforms, such as Textizen, uses SMS text messages to conduct simple and short surveys. . SGA will develop a brief survey and encourage residents to respond to the survey with advertising or notices where people sit, standstill, or generally have their phones out (examples: transit stops, in-transit ads, cafe table tops, daycare centers, or corner stores.) We can also develop direct mail pieces asking residents to respond from a postcard, door-to-door flyer, or utility bill inserts. The ad or direct mail piece will engage participants with a hook, usually a yes or no question that gets them interested or emotional enough to respond through the topic or the phrasing. Once they respond to the first question, a series of 4-5 multiple choice questions follow by text. The ads or direct mail pieces can be mailed to the stakeholder database, and posted in City Hall, community centers, the transit center, bus shelters, and in businesses. Once engaged in a survey, Textizen will allow us to send survey respondents reminders about city-wide public meetings.

MEETINGS-IN-A BOX: NEIGHBORHOOD & COMMUNITY ORGANIZATIONS

There will be numerous visioning workshops and stakeholder meetings scheduled and/or will occur throughout the course of the project. While it is not feasible for the City to attend/participate in every existing event or organizational meeting, it is important to capture additional viewpoints and feedback to the extent possible. The “meeting in a box” concept (described below) is designed for community groups and neighborhood associations to gather at a convenient time and share thoughts about the future of Newport.

SGA will provide Meeting-in-a-Box materials in the form of a pre-made kit, to representatives of neighborhood organizations or events, as identified throughout the project. The kit will contain everything needed for organizations to host their own discussions, including instruction sheets for facilitators, discussion questions, and worksheets for participant responses. These materials will be designed to help each organization prepare and implement their own meeting, including information about the project and suggestions for techniques to solicit feedback from participants.

The Meeting-in-a-Box format is intended for established organizations and neighborhood groups and is not appropriate for individuals (there will be numerous opportunities for individuals to provide feedback). SGA will work with City staff to identify key contacts within interested community and neighborhood organizations. We would provide Meeting-in-a-Box materials to the identified contacts. We would also provide self-addressed paid envelopes for the organization to send back the materials.

Task 3. Capturing Community Desires

During the community engagement and outreach, SGA will help the City facilitate the meetings and workshops and capture the community input and feedback. At the conclusion of the Listen and Learn process, SGA will compile the community responses in a thorough, comprehensible, and user-friendly report to guide the City with potential updates to the General Plan.

The following are the tasks SGA will complete to facilitate the workshops and meetings while recording the community sentiments:

Task 1: Meeting/Workshop Preparation

SGA will plan and coordinate the workshop logistics with the City's Steering Committee.

- Meet to discuss goals and objectives for meeting or workshop
- Layout meeting plan (specific items and timing)
- Draft agenda
- Assist in coordinating logistics
- Develop meeting or workshop materials

Task 2: Meeting/Workshop Facilitation

SGA will facilitate the meeting and discussion of agenda items.

- Facilitate meeting or workshop
- Coordinate/facilitate input and recommendations
- Record meeting notes, develop consensus statement, and other community recommendations

Task 3: Meeting/Workshop Follow-Up

SGA will draft summaries of meetings and compile into a preliminary report.

Task 4: Draft Community Input Guide

SGA will compile notes, comments, and input into a comprehensive report.

- Present to Steering Committee
- Compile report based on "Priority Issues" (i.e., longer term goals and objectives)
- Incorporate staff comments and stakeholder input from the workshops

Task 5: Final Community Input Guide

SGA will include feedback and input from Steering Committee to develop a final Community Input Guide.

ANTICIPATED WORK SCHEDULE

TASK 1: FAMILIARIZATION GENERAL PLAN	PROPOSED PROJECT SCHEDULE
Pre-Project strategy planning	July 2019
Kick off meeting with City	July 2019
Conduct situational analysis, interview City and stakeholders	July - August 2019
Review and research General Plan, Vision Statement, State requirements	July - August 2019
Develop work plan and finalize schedule	July - August 2019
Attend Steering Committee meetings	August 2019 – February 2020

TASK 2. COMMUNITY ENGAGEMENT AND OUTREACH PROGRAM	PROPOSED PROJECT SCHEDULE
Develop Outreach Program plan and schedule	August 2019
Preparation and maintenance of an interactive online webpage/portal	August - September 2019
Develop appropriate user-friendly educational materials	September 2019 – February 2020
Facilitate visioning workshop	September 2019 – February 2020
Facilitate individual stakeholder meeting	September 2019 – February 2020
Develop digital and social media engagement	September 2019 – February 2020
Develop and maintain interactive text messaging platforms	September 2019 – February 2020
Develop and mail out Meeting-in-a Box	September 2019 – February 2020

TASK 3. CAPTURING COMMUNITY DESIRES	PROPOSED PROJECT SCHEDULE
Draft Community Input Guide to Steering Committee	March 2020
Finalize Community Input Guide	March 2020

SGA EXPERIENCE

Over the years, SGA has had the privilege to develop and implement engagement and outreach plans for various government entities. We have included several different case studies that demonstrate our abilities to not only increase awareness but to engage residents and stakeholders to respond.

SANTA MONICA BAY RESTORATION PLAN UPDATE

Reference:

Dr. Shelley Luce, CEO - Heal the Bay (former Executive Director of the Santa Monica Bay Restoration Foundation)

310-451-1500 x108 , sluce@healthebay.org

01. THE CHALLENGE

A comprehensive update to the Bay Restoration Plan (BRP) was developed in order to acknowledge the many completed actions and areas of substantial progress since the original Plan. More importantly, the update addressed remaining roadblocks and challenges as well as newly emerging issues. The updated BRP laid out the strategies and partners for advancing Bay and watershed restoration over the next 5 years, approximately. The updated BRP consisted of 14 goals, 67 objectives, and 170 milestones to fulfill SMBRC's mission to "improve water quality, conserve and rehabilitate natural resources, and protect the Bay's benefits and values."

SGA helped build public-private partnerships, facilitate a stakeholder-driven consensus process, and raised public awareness in order to restore and preserve the Bay's many beneficial uses are key objectives of the SMBRC.

02. THE SOLUTION

SMBRC is an independent non-regulatory state agency whose mission is to improve water quality, conserve and rehabilitate natural resources, and protect the Bay's benefits and values. The SMBRC is a unique coalition of governments, environmentalists, scientists, industry and the public.

SGA, notably Stephen Groner, facilitated a committee on behalf of SMBRC to address concerns and solicit feedback for the update. He brought together a diverse range of regional stakeholders including the City of Malibu, elected officials, the California Regional Water Quality Control Board, the City and County of Los Angeles (representing both building and public health officials), and special interest groups like Heal the Bay and local industry representatives to form a committee.

03. THE RESULTS

After examining the issue, Stephen helped the committee come to a consensus on how to best address all the issues concerning the health of the Bay. He helped develop and formalize a plan to

address needs and concerns of the various stakeholders. He also assisted the committee to apply for and win an \$800,000 Clean Beach Initiative Grant to fund the committee recommendations and implement all four stages of the updated plan. The third stage of the plan, and the most crucial for the program to be sustainable, was developing a protocol for interagency coordination with an emphasis on the City of Malibu and the Regional Water Quality Control Board. This stage was achievable because both agencies were brought in early during the committee development.

CLEARWATER TUNNEL PROJECT - LA COUNTY SANITATION DISTRICTS

Reference:

Environmental Outreach Strategies

Adi Liberman, adi@eoscal.com, 310-846-8884

01. THE CHALLENGE

The Sanitation Districts of Los Angeles County wanted to implement an outreach plan such that a positive relationship with affected communities is maintained throughout construction and tunneling activities updates are effectively communicated to the public.

02. THE SOLUTION

The Clearwater Project includes a new 7-mile long tunnel that will be almost entirely underneath public right-of-way (streets). Construction started in 2018 in Carson and will finish in 2025 at Royal Palms Beach, where the tunnel will be connected to existing outfalls. The construction project is necessary to fulfill the Districts' mission to protect public health and the environment.

SGA created and implemented a community engagement and outreach plan that included the best strategies to communicate with the Districts' constituents. These strategies involve face-to-face meetings, e-mails, newsletters, social media, and town halls/roundtables meetings. In developing the outreach plan, we followed these guidelines:

- Early and continual public involvement
- Inclusionary practices in activities and notification
- Collaboration with other agencies and local governments
- Convenient meeting times and locations
- Reasonable access to information
- Timely notice of public involvement activities, including appropriate review and comment periods
- Acknowledgment and consideration of public comments

At the outreach events, we worked with Districts staff to answer questions, explained any existing or upcoming construction plans, and provided outreach materials. Constituents were able to voice their concerns and provide feedback to Districts staff about construction noise, traffic, and activities.

03. THE RESULTS

Throughout the project, the Districts is responsible for engaging with the public and providing up-to-date information and solicit concerns in order to minimize the disruption to businesses and residents during the construction phase. With the direction of the Districts, SGA helped develop an outreach plan that consisted of the following elements:

- Planning, Research, and Stakeholder Mapping
- Presentations, Meetings, and Public Forums
- Message + Talking Point Development
- Digital Platforms + Channels
- Collateral Development
- Media Relations

In order to achieve broad audience exposure and engagement, SGA utilized online communications through the Districts' website and social media platforms (i.e. Facebook). We redesigned the Project's website so that stakeholders could easily access program information. On Facebook, we developed content and ads to attract more followers, test messaging, and invited engaged residents, business owners, and elected officials to correspond with the Districts.



SGA has also helped with community presentations and workshops. We have assisted with developing a database of elected officials, community and environmental organizations, homeowner associations, Chamber of Commerce, and neighborhood councils. In an effort to be proactive, we reached out to these groups to address potential concerns or issues. To thwart any misconceptions about the project, SGA developed a fact sheet that stated the purpose and benefits of the project in a clear and concise manner. These fact sheets were handed out during community presentations and workshops.



PROTECTING WATERWAYS AND
PUBLIC HEALTH THROUGH
NEW INFRASTRUCTURE

PROJECT OVERVIEW

The Sanitation Districts of Los Angeles County operate and maintain the Joint Outfall System (JOS), Los Angeles County's main sewer system, which collects and treats the wastewater (sewage) from over 5 million people in the Los Angeles basin. The largest wastewater treatment facility in the JOS, the Joint Water Pollution Control Plant (JWPCP) in Carson, uses two large tunnels to convey treated water to the ocean. These tunnels are nearly 60 and 80 years old.

In 2012, the Sanitation Districts' Board of Directors approved a master plan to protect local waterways by address aging critical infrastructure. This master plan, called the Clearwater Project, identified improvements needed to ensure the reliability of the JOS and provide sufficient system capacity through the year 2050. One of the key recommendations resulting from this comprehensive, multi-year effort was a new tunnel.

The Clearwater Project includes a new, 7-mile long tunnel that will be almost entirely underneath public right-of-way (streets). Construction is anticipated to start in 2018 in Carson and finish in 2025 at Royal Palms Beach, where the tunnel will be connected to existing outfalls.



CONSTRUCTION (2018-2025)

The new tunnel will begin at the JWPCP with the construction of an access shaft. This shaft will be used throughout the project as the entry/exit point for construction workers, tunnel materials (e.g., liner segments), and equipment. Further, the shaft will be the exit point for all the excavated material. A noise barrier, approximately 20 feet in height, will be erected between the site and nearby sensitive receptors.

At Royal Palms Beach, the new tunnel will connect to the existing ocean outfalls. This work will take a little over two years to complete. All construction work will occur Monday through Friday and will mostly be underground such that, once complete, the site will look similar to pre-construction conditions. Approximately 50 parking spaces will be needed during this work. The beach will be accessible at all times.



NEW TUNNEL CONSTRUCTION SCHEDULE

WHY THE CLEARWATER PROJECT?

Aging infrastructure concerns - The existing tunnels, which were built in 1937 and 1958, cannot be taken out of service because they are needed to continuously carry flow.

Earthquake concerns - The existing tunnels do not meet current earthquake standards and cross two earthquake faults.

Overflow concerns - The capacity of the existing tunnels was almost exceeded twice during major rainstorms, including January 2017. If the combined tunnel capacity is exceeded, partially treated or untreated wastewater would be discharged to surrounding waterways, resulting in the degradation of water quality.

FREQUENTLY ASKED QUESTIONS

1. HOW LONG WILL THE CLEARWATER PROJECT TAKE?

Construction will begin in 2018 at the JWPCP in Carson. Tunneling will start in 2020 and end in 2024. Work at Royal Palms Beach to connect the new tunnel to the existing outfalls will begin in 2023. The project will conclude in 2025.

2. WHICH CITIES/COMMUNITIES WILL BE INVOLVED?

The tunnel will start under the southwest side of the JWPCP, then under Figueroa Boulevard, Harbor Regional Park, North Gaffey Street, Capitol Drive, Western Avenue (through South Dodson Avenue), and terminate under Royal Palms Beach. The tunnel must pass under commercial property to make the turn from Gaffey to Capitol and from Capitol to Western. The tunnel alignment passes through or near the City of Carson, City of Lomita and City of Ranch Palos Verdes as well as the communities of Wilmington and San Pedro within the City of Los Angeles.

3. WILL THE NEW TUNNEL RESULT IN MORE LOCAL TRAFFIC?

As part of the environmental impact analysis for this project, it was determined that potential traffic impacts will be less than significant.

4. WHAT ASSURANCES/GUARANTEES CAN THE SANITATION DISTRICTS PROVIDE REGARDING THE POTENTIAL FOR PROPERTY DAMAGE DUE TO TUNNELING ACTIVITIES?

For the Clearwater Project, over \$7 million will be invested in a comprehensive geotechnical monitoring system to ensure safe tunneling and avoid any property damage. Furthermore, as a public agency, we are responsible for any damage caused by our construction projects.



5. HOW WILL TUNNEL CONSTRUCTION AFFECT MY HOME, MY COMMUNITY, AND ME?

The Sanitation Districts will construct a tunnel utilizing a state-of-the-art, balanced pressure, tunnel boring machine (TBM). This multi-million dollar system will be specifically built for this project. The new tunnel will mostly be located within public right-of-way (e.g., under streets) and will be 30 to 450 feet deep, so there will be little to no noticeable vibration or noise. The new tunnel alignment will not pass under any homes. Tunnel construction will be closely monitored using an extensive vibration and settlement detection system, which will be installed along the tunnel alignment. Tunneling will be slowed or stopped if any significant vibration or settlement is detected. The most visible element of the project will be the access shaft at the JWPCP in Carson, which is needed to lower the TBM and construction material into the ground, remove soil from the underground excavation, and provide labor access during construction. The construction shaft site will be screened with barriers as necessary to minimize visual and noise impacts. A smaller exit shaft site is needed at Royal Palms Beach to remove the TBM and connect the new tunnel to the existing ocean outfalls.

For updates, email us at ClearwaterProject@lacsdc.org, call (877) 300-WATER, or visit our Clearwater Project Facebook page:

 [Facebook.com/ClearwaterProjectLA](https://www.facebook.com/ClearwaterProjectLA)



You're invited to a
**PUBLIC WORKSHOP ON
CLEARWATER PROJECT CONSTRUCTION**



**PUBLIC WORKSHOP ON
CLEARWATER PROJECT CONSTRUCTION**

Construction on the Sanitation Districts of Los Angeles County's Clearwater Project begins in 2018. The project will protect local waterways by addressing aging sewer system infrastructure.

Above-ground construction will be limited to the southwest end of our Joint Water Pollution Control Plant in Carson and at Royal Palms Beach in San Pedro.

Workshop topics will include:

- ✓ How the project will protect the environment
- ✓ Our plans to minimize impacts from construction activities
- ✓ Ways you can stay engaged

This workshop is primarily intended for communities near the Joint Water Pollution Control Plant. The next workshop will be held in Carson. Other workshops for communities further south will be held in the coming months.

📄 clearwater.lacsd.org • 📞 (877) 300-WATER • 📘 ClearwaterProjectLA • ✉ clearwater@lacsd.org

MARCH 27 AT 6:30 PM
WILMINGTON SENIOR CENTER
1371 EUBANK AVENUE
WILMINGTON, CA 90744



WATTS RE:IMAGINED, WATTS NEIGHBORHOOD REVITALIZATION – COUNTY OF LOS ANGELES

Reference:

Chris Jordan, Executive Director, Grant Housing & Economic Development - Grant AME Church
323-564-0410, cjordan@granthousing.org

01. THE CHALLENGE

For many, Watts is synonymous with the folk art towers of the same name and the mass civil unrest that engulfed the LA County neighborhood 50 years ago. A new partnership steered by Watts-based Grant EDC (a nonprofit connected to the Grant AME Church) and the Natural Resources Defense Council's Urban Solutions program, and in collaboration with several other local organizations, sought to revitalize the neighborhood and strengthen the community by remaking its buildings and streetscapes so that they were more inviting to pedestrians and more connected to parks, green spaces, and transit. The ambitious goal was to turn Watts into "a thriving neighborhood that its residents deserve."

SGA was brought in to help create new branding, and develop and implement new communication strategies to promote the revitalization of the historic neighborhood of Watts with developments that focused on quality of life, social equity, economic opportunity, and environmental sustainability.

02. THE SOLUTION

SGA created new branding and communication strategy for Watts Re:Imagined. Our goal was to create a look, feel, voice and narrative that helped Watts Re: Imagined meet its multi-faceted goals. Watts Re: Imagined had two major goals:

1. Leverage the visibility of the 50th anniversary of the Watts Riots to promote brand recognition and a widespread understanding of the Watts Re:Imagined vision.
2. Garner interest and support from stakeholders, politicians, and potential investors to bring the Watts Re:Imagined plan to life.

Through a strategic, integrated communications and outreach effort, SGA informed, engaged, and promoted Watts Re:Imagined to the local community and the greater Los Angeles public. We achieved enthusiastic support from Watts Community Studio Los Angeles City Council District 15, City of Los Angeles Community Redevelopment Agency Plan, Central Avenue Master Plan and Corridor Study CRA/LA, Watts Greenstreets Rivers and Mountains Conservancy, Watts Watershed Annenberg Foundation and Los Angeles and San Gabriel Rivers Watershed Council, Watts Charrette Watts Re:Imagined, Watts Our Town Los Angeles Department of Cultural Affairs and National Endowment for the Arts, Watts Health Assessment Kaiser Permanente, Creative Housing Associates, and Kounkuey Design Initiative.

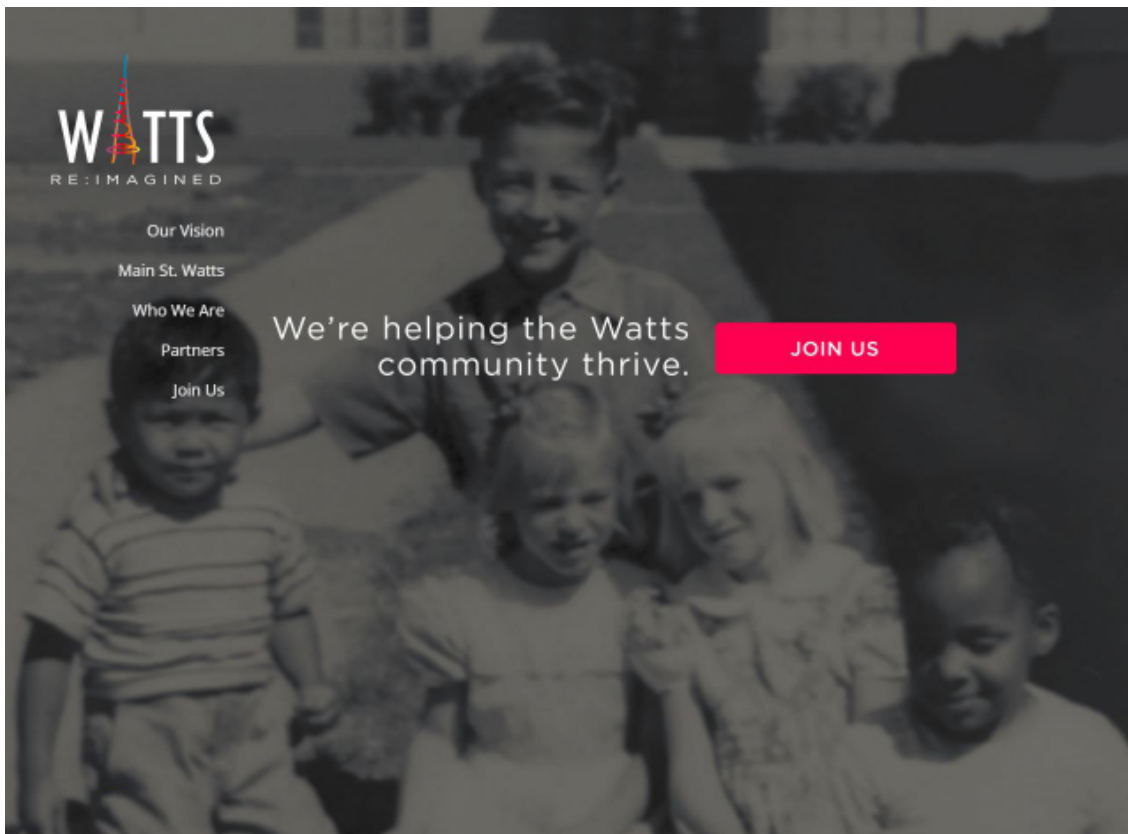
This project showcases one of SGA's incredibly important skill sets: the ability to hit the ground running. SGA found and nurtured the voice of the campaign, developed a social media suite, built a mobile responsive website, created new branding material, developed a communication plan and events master calendar that tied together the plans of various stakeholders and contributors, produced an editorial calendar of content that could honor the range of voices that needed to be heard, and successfully managed the ongoing promotion up until the 50th Anniversary of the Watts Uprising.

03. THE RESULTS

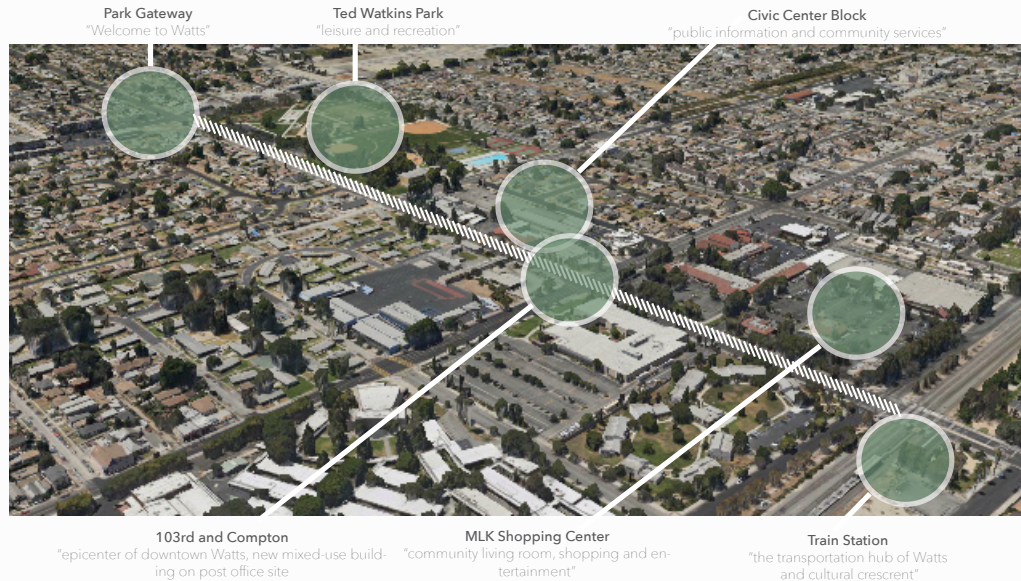
From SGA's review of existing materials, the client survey, and attendance of the strategic planning meetings, SGA was able to create an effective a Strategic Communications Plan. The Plan outlined the strategic and tactical objectives of the program and set out metrics for what success would look like. It also included a more detailed timeline and any additional deliverables that were later identified as necessary. This document was updated quarterly as the understanding of the project evolved.

We produced a brief report each quarter synthesizing the key findings. These documents were a key check-in for the team to make sure all parties were working in concert. The results of these check-ins were used to update the Strategic Communications Plan.

At the conclusion of the project, SGA delivered a comprehensive report on project activities, deliverables, metrics and recommendations for future projects, based on our experience working on the project. This closeout document served as a final update to the Strategic Communication Plan and creative brief, ensuring that the Watts Re:Imagined team had the most comprehensive understanding of the communication strategy and a stable foundation on which to build more growth.



main street vision:



18



Our Vision
Our Scope
Who We Are
About Watts
Engaged Network
Contact Us
News

Who We Are

Watts Re:Imagined is a community-based improvement initiative led by Grant Housing & Economic Development Corp (Grant EDC) and the Natural Resources Defense Council (NRDC) Urban Solutions program.

Grant EDC is a non-profit connected to [Grant AME Church](#), which will celebrate 110 years in Watts in 2016. [NRDC](#) is an international environmental and public policy organization and the [Urban Solutions](#) program focuses on building healthy, sustainable cities.



We're grateful to have these highly-skilled organizations lending their expertise and creativity to the project.

- Creative Housing Associates (CHA)
- Estolano LeSar Perez Advisors (ELP)
- Kounkuey Design Initiative (KDI)
- S. Groner Associates, Inc. (SGA)
- Global Green USA

ECONOMIC DEVELOPMENT PROJECT – DOWNTOWN LONG BEACH ASSOCIATES

Reference:

Downtown Long Beach Associates
Kraig Koian, 562-436-4259, kraigk@dlba.org

01. THE CHALLENGE

The Downtown Long Beach Associates (DLBA) wanted to better understand the manner and extent to which visitors of Downtown Long Beach use the area. DLBA wanted statistically significant answers to questions to the visitor's purpose of the visit, duration, economic factors, intended activities while in the region, and perceptions of Downtown Long Beach. These answers would be used for future economic development and public realm programming.

To gather these answers, SGA conducted pedestrian intercept surveys over the span of three years to better understand the demographic and behavioral trends of the various user groups in Downtown Long Beach.

02. THE SOLUTION

SGA designed the survey to track changes over time with the pedestrian responses. The changes would then be used to further refine and demonstrate the success of economic development initiatives. In addition to understanding the demographic, economic, and behavioral perspectives of visitors to Downtown Long Beach (DTLB), DLBA wanted to also understand the larger narratives that embody the DTLB experience.

While the questions in the survey instrument were organized for ease of execution in the field, the findings were organized into relational bundles that considered different aspects of a visitor's relationship with DTLB. SGA took the data and then segmented it by key demographic classifications. The most important classifications were age, income, and reason for visiting DTLB.

03. THE RESULTS

A total of 322 pedestrian responses were collected at 10 different survey locations across DTLB. From the economic profiles and other behavioral data, three core insights were made:

1. **Provide an Authentic Long Beach Experience.** The biggest spenders were the segments who chose to live in DTLB or chose to visit frequently (e.g. Residents and Visitors of all types).
2. **Expand the Fan Club.** Increasing the number of monthly visits was a driver of total spending. Visitors were an apt audience to increase monthly visits and, ideally, bring new visitors with them.
3. **Understand the Gaps.** Some audiences were either already captive (e.g. Wealthy Workers) or not big spenders (e.g. Typical Tourists) and their relationship with DTLB should be considered in designing any outreach efforts.

At the conclusion of the project, SGA delivered the following:

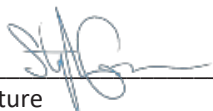
- **Strategic Plan.** A strategic plan was created with the DLBA for each survey cycle. This strategic plan culminated with the identification of 10 survey sites, 6 of those being primary survey sites.
- **Completed Survey.** A target of 322 completed surveys was secured.
- **Data Set.** A scrubbed and cleaned data set was provided to DLBA along with a codebook to assist in interpreting the data or conducting future analyses. This data set was produced after the full range of QA/QC controls were employed.
- **Draft Report.** A draft report was provided to DLBA covering key analyses and findings of the survey.
- **Final Report.** A final report was provided to DLBA summarizing all key finding and work produced. The final report included an appendix that contains all original analyses, graphs, and data.

PROPOSAL ATTACHMENTS

ATTACHMENT A: STATEMENT OF COMPLIANCE

Instructions: Each proposal must be accompanied by a signed Statement of Compliance. The Proposer must sign one, and only one of the declarations stated below and remit as part of your Proposal as Attachment A.

No Exceptions. The undersigned declares that the Proposal submitted by (Name of Firm) S. Groner Associates to prepare and execute a community outreach program with the goal of receiving and documenting the community's desire for change with respect to its General Plan as described in the RFP was prepared in strict compliance with the instructions, conditions, and terms listed in the RFP, Scope of Services and Draft Agreement with no exceptions taken.



Signature

04/20/2019

Date

Stephen Groner, President

Printed Name and Title

Exceptions. By signing below, the Proposer acknowledges that the Proposal submitted by (Name of Firm) _____ has been prepared in consideration of and with exception to some of the terms of the RFP, Scope of Services and Draft Agreement. By signing below, the Proposer declares that the Proposal includes a statement that identifies each item to which the Proposer is taking exception or is recommending change, includes the suggested rewording of the contractual obligations or suggested change in the RFP, and identifies the reasons for submitting the proposed exception or change. The City reserves the right to reject any declarations that are not accompanied with the required documentation as described above.

Signature

Date

Printed Name and Title

[Attach a separate sheet(s) detailing each exception being taken]

ATTACHMENT B: PROPOSER INFORMATION FORM

Instructions: Complete the form below and remit as part of your Proposal as Attachment B.

CONSULTANT INFORMATION

CONSULTANT/FIRM NAME: S. Groner Associates

ADDRESS FOR NOTICES: 100 West Broadway, Suite 290
Long Beach, CA 90802

MAIN CONTACT (NAME AND TITLE): Stephen Groner, President

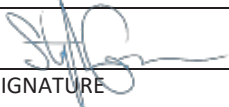
CONTACT NUMBERS: TELEPHONE: 562-597-0205 FAX: _____

E-MAIL ADDRESS: SGroner@SGAMarketing.com

FIRM SIGNATURE AUTHORIZATION AND CERTIFICATION

Per the California Corporations Code, Business and Professions Code, the Consultant's Bylaws/Operating Agreement and/or the attached Board Resolution (if applicable), I/we hereby verify that I/we am/are (an) authorized signatory(ies) for the aforementioned Consultant and as such am/are authorized to sign and bind the Consultant in contract with the City of Newport Beach.

1. CONSULTANT AUTHORIZED SIGNATORY(IES):

	Stephen Groner	President	04/20/2019
SIGNATURE	PRINT NAME	TITLE	DATE
SIGNATURE	PRINT NAME	TITLE	DATE

2. SIGNATURE AUTHORIZATION IS PROVIDED IN ACCORDANCE WITH:

☐ Proposer's Bylaws/ Operating Agreement Section _____ ☐ Copy Attached

☐ Board Resolution ☐ Copy Attached

☒ Corporations or Business and Professions Code**

**If Consultant is a corporation, two (2) authorized signatories will be required on all documents submitted, unless specified in the organization's Bylaws or corporate resolution.

IMPORTANT NOTE: If the signature authorization status of any individual changes during the term of the contract, it is the responsibility of the Consultant to contact the City Administrator for the Consultant regarding the change and to complete and submit a new Signature Authorization Form. Incorrect information on file may delay the processing of any of the documents submitted.

ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST

Instructions: This checklist is provided as a guide for Proposers to assemble Proposals. As closely as possible, please adhere to the following format and order when assembling proposals. Please note that part of the evaluation criteria takes into consideration the responsiveness of a proposal; proposals missing any required attachments shall be evaluated accordingly. Submittals should follow the same order and sections indicated below:

PART 1: TECHNICAL PROPOSAL SECTION

SECTION A: PROPOSER BACKGROUND

☒ **COVER LETTER**

A cover letter not to exceed two (2) pages in length shall summarize key elements of the proposal and demonstrate an understanding of the Project as requested. The cover letter shall be signed by a representative able to submit a formal offer and bind the Proposer to contractual obligations.

☒ **ORGANIZATIONAL STRUCTURE**

Provide identification of the project team, including organizational chart and resumes of each team member. The consultant's primary representative shall be available on all occasions for discussion with City staff. Specific responsibilities of each team member, along with their anticipated total effort in the projects, shall be detailed in a matrix of total hours of work for each task versus each job classification on the project. Identify key personnel from your firm, including specific personnel that would be assigned to this Project, if any. Any and all Prime Contractor and Subcontractor relationships and responsibilities must be detailed.

SECTION B: METHODOLOGY

☒ **PROPOSAL – METHODOLOGY**

Provide your proposed work plan, which shall address every point listed in the scope of services. The ideal work plan should provide an overview of the processes that would be utilized by your firm in facilitating this Project and demonstrate familiarity with developing similar plans. If your firm offers additional services not specifically described in the Scope of Services, provide a description of these services and the benefit they serve to the City.

☒ **ANTICIPATED WORK SCHEDULE**

Provide a comprehensive proposed project schedule, including proposed start and completion dates for each task.

SECTION C: PROPOSER EXPERIENCE

☒ **MINIMUM REQUIREMENT: EXPERIENCE**

Demonstrate experience with at least three (3) projects of a similar scope and nature by providing a synopsis of each project, as well as relevant exemplary work produced for each project.

☒ **REFERENCES/RECENT PROJECT HISTORY**

Provide at least three (3) references for whom your firm has performed similar services. Provide a brief synopsis of the services performed, and contact information for each reference. Emphasis will be placed on references that are local government entities. The City reserves the right to contact any references provided.

SECTION D: PROPOSAL ATTACHMENTS

☒ **ATTACHMENT A: STATEMENT OF COMPLIANCE**

Proposers must submit a signed Statement of Compliance with proposals. The Statement of Compliance is separated into two sections, only one of which is to be signed. The first section states that the Consultant agrees with all terms and conditions as indicated in this RFP document and/or Draft Agreement; the second section states that the Consultant intends to take exception to certain terms and conditions within the RFP document and/or Draft Agreement.

☒ **ATTACHMENT B: PROPOSER INFORMATION FORM**

☒ **ATTACHMENT C: PROPOSAL REQUIREMENTS CHECKLIST**

☒ **OTHER INFORMATION**

Include any other information you consider to be relevant to the proposal.

PART 2: COMPENSATION PROPOSAL SECTION

☒ **COST/FEE PROPOSAL**

Provide a not-to-exceed fee for the services to be provided and current fee schedule for each job classification. **These items shall be submitted in a separate submittal.** The fee shall be broken down showing hours for each job classification for each task, fee for each task, and shall include miscellaneous costs such as travel, duplication, clerical support, etc. The City reserves the right to eliminate any tasks from the scope of work, and reduce the not-to-exceed fee by the cost of the task eliminated.

SUBMISSION INSTRUCTIONS

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE TECHNICAL PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov

☒ **ELECTRONICALLY TRANSMIT ONE (1) COPY OF THE COMPENSATION PROPOSAL SECTION TO RFP ADMINISTRATOR**

Proposals must be e-mailed to: anguyen@newportbeachca.gov