



**Bid Number: 9439-09-Z**

Professional Public Outreach, Involvement, and Facilitation Services for the City of San Diego  
Uptown, Greater North Park, and Greater Golden Hill Community Plan Update Process

**Technical Proposal Volume**

**Submitted to:**

Michael Winterberg, CPPB, Procurement Specialist  
City of San Diego  
Purchasing & Contracting Department 1  
200 Third Avenue, Suite 200 San  
Diego, CA 92 101-4195

**Submitted by:**

Catherine Smith, JD, President  
Collaborative Services  
427 C Street, Suite 200  
San Diego, CA92101  
t: 619/232/211 2 ext. 1 12  
catherine@collaborativeservices.com

**Date:**

August 21, 2008





## Executive Summary

Collaborative Services' mission is to bring people together to improve our community. Through this mission, our services focus on stakeholders involved in revitalization, urban planning, natural resources management, and transportation improvements. We provide one-to-one outreach, meeting facilitation, special events coordination, and press and media coordination services to encourage and promote community involvement for various projects.

Collaborative Services understands the City of San Diego City Planning & Community Investment Department's role and its work currently in progress throughout the City. We have over 10 years of experience working with the City of San Diego and have experience working with the Uptown, Greater North Park, and Greater Golden Hill communities through our previous work. Our strengths are designing and facilitating consensus-building strategies that build on previous success, create new success, and engage more partners in that success. We distinguish ourselves in the following four ways:

1) Collaborative Services is skilled at building consensus and partnerships between public agencies and communities: Every day we work with public agencies, community planning groups, community-based organizations, and their stakeholders. Our training and background in conflict resolution and public involvement is crucial to creating effective, trusted communications between agencies and their communities. This trust is essential to managing the challenges that are inherent when communities undertake significant changes through redevelopment and revitalization.

2) Collaborative Services has a strong understanding of revitalization stakeholders, issues, and timelines: Collaborative Services' approach allows communities to address their vision, goals and needs. The City of San Diego's Midway Pacific Corridor Community Plan Amendment and the City of Oceanside's Transit-Oriented Development Study are two examples of how we have successfully engaged the community to receive input on topics such as sustainability, balanced communities, equitable development, provision of public services and facilities, forms of mobility, urban design, climate change impacts, economic prosperity, and historic preservation. Our firm specializes in community participation and outreach to ensure that the plans being prepared are a direct reflection of the community's goals, interest, and vision.

3) Collaborative Services is able engage a variety of stakeholders: Collaborative Services is known for building relationships across economic, cultural, geographic and political boundaries. This ability

many worlds, many solutions  
427 C Street, Suite 200  
San Diego CA 92101  
(T) 619.232.2112  
(F) 619.232.2012  
[www.collaborativeservices.biz](http://www.collaborativeservices.biz)

to break through perceived and real differences is essential to accomplishing the mission of improving our community. We have successfully partnered with Vietnamese, Filipino and Somalian translators in previous projects to enhance community outreach and involvement efforts, in addition to our own bilingual (English-Spanish) staff members, Translation Solutions is part of our team to provide translation services in over 15 languages for both written and verbal communication.

4) Collaborative Services has a creative, problem-solving team: Our core team includes marketing, public outreach, facilitation, media coordination, special event management, graphic design and land use professionals. By blending the disciplines that are relevant to revitalization in-house, we can develop and implement creative, accurate, and appropriate solutions that are specific to the project and its stakeholders. This blend results in creating credible community engagement and an increase in the community's willingness to follow through on the agency's goals. Our in-house graphics and land-use consulting team is Warner Architecture + Design.

Based on the current information provided in the RFP, an implementation plan and a budget are provided with this submittal. The "Specifications" section illustrates similar projects that involve public outreach, involvement and facilitation services and also defines how our team members would participate and the roles that each would perform during the project. Our goal with this plan is to deliver to the City Planning and Community Investment Department and the community the information necessary to make high-quality and informed decisions that lead to the successful completion of a comprehensive update to the City's General Plan and support the redevelopment efforts already in progress in these neighborhoods.

Thank you again for the opportunity to present our qualifications to the City of San Diego City Planning and Community Investment Department. We value the Department's efforts to improve San Diego's neighborhoods and we appreciate the opportunity to be considered as a support to its endeavors.

**Collaborative Services**

many worlds, many solutions

### **A. CORE REQUIREMENTS 1.**

#### **Project Administration**

a. The City is looking for a consultant who can devote a committed portion of his/her time to this project over a period of 24 month period. NOTE: CPCI anticipates that it will take approximately 24 months to reach the first public hearing to consider a formal recommendation on the Community Plan Update process.

RESPONSE: Collaborative Services is skilled at managing projects that extend over several years. We will devote a committed portion of time to this significant project over a period of 24 months to support outreach to Uptown, Greater North Park, and Greater Golden Hill communities. Our firm has the staff capability to ensure that work tasks are efficiently completed on time.

b. The Consultant shall manage any of his/her own staff or any necessary subconsultants if applicable and be the key point of contact for the City Project Manager regarding the public outreach component of the plan update process.

RESPONSE: Collaborative Services has assigned a Project Manager to this project, who will manage our own staff or any necessary subconsultants if applicable, and is familiar with City of San Diego goals, leaderships, and processes. Mr. Strong is the appointed Project Manager. He previously worked in Council District 1 as a community representative and for State Assembly Member Zettel. He has a thorough understanding and skill in high profile urban planning projects. Our Project Manager will be the key point of contact for the City's Project Manager regarding the public outreach component of the plan update process. At the beginning of the project, our Project Manager will recommend a schedule for regular project management meetings and correspondence, as well as confirm the roles and responsibilities of all Collaborative Services' team members to the City's Project Manager to describe and report how work tasks will be efficiently prioritized and completed on time.

c. The Consultant shall play an active role to maintain the project schedule and budget as it relates to the public outreach component of the plan update process. Regularly scheduled coordination and status meetings shall be held with City staff to review the project status and budget, obtain required City approval, discuss issues that have the potential of adversely affecting the project budget, schedule, or product, and make decisions regarding procedures. The Consultant shall prepare meeting agendas in consultation with the City Project Manager, distribute agendas prior to meetings, arrange for appropriate participants to attend, and distribute meeting notes for regular project status meetings, project working group meetings, and public meetings. Meeting minutes shall be distributed within seven working days of the meeting and shall include the issues discussed, action items, and responsible parties. The Consultant shall use Microsoft Project, or equivalent software to maintain an up-to-date project schedule.

## Section II, Specifications

RESPONSE: Collaborative Services will play an active role to maintain the project schedule and budget as it relates to the public outreach component of the plan update process. Regularly scheduled coordination and status meetings will be held with City staff to review the project status and budget, obtain required City approval, make decisions and discuss issues that have the potential of adversely affecting the project budget, schedule, or product. By having regular correspondence and status meetings, progress can be tracked, work items can be prioritized, and any challenges that may occur can be addressed quickly. Collaborative Services shall prepare meeting agendas in consultation with the City Project Manager, distribute agendas prior to meetings to attendees, arrange for appropriate participants to attend, and distribute meeting minutes for regular project status meetings, project working group meetings, and public meetings. Meeting minutes shall be distributed within seven working days of the meeting and shall include the issues discussed, action items, and responsible parties. Summaries of the meetings are helpful as they document new info, maintain roles and responsibilities, and provide an ongoing reference for decisions and their implementation. Collaborative Services currently uses Fast Track Pro for scheduling, which is a program equivalent to Microsoft Project.

Activity Name		Start Date	Finish Date	MM																		
				May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov
130	Ad Hoc Reeling #6: Meet the experts preview of the specific plan's analysis and preview of workshop #4 and subsequent planning commission and city council planning Commission and City Council Meetings: Present draft documents and to request their initiation of public review process	3/1/07	3/21/07		1				1													1
133	Service publication & Noticing Publicity: CDC consultant prepares and CW/City Staff reviews: Two (2) articles and six (6) broadcast	6/7/06	4/30/07																			
135	PubHoly: 3.65 4th Quarterly insert into CDC newsletter: How our plan stacks up to other cities who have implemented similar plans • provide graphic layout and content, edit per City and CDC's review, final pdf given to	7/12/07	11/12/07																			
136	Client Meeting (1) to review design concepts, information, and materials	9/22/06	10/30/06																			
138	Client Meeting (1) to review first draft design guidelines and development standards	10/27/06	11/1/06																			
39	Client Meeting (1) to review second draft design guidelines and development standards	12/4/06	12/11/06																			
40	Client meeting (1) to review first draft of Specific Plan	3/12/07																				
41	Client meeting (1) to review second draft of Specific Plan	3/26/07																				
42	3.71 public hearing process Client meeting, (1) to review and debrief Workshop A.3.72	4/13/07																				
43	Client meeting to review and debrief 3 Adhoc meetings and 1 public workshop	4/2/07																				
44	Client meeting to review and debrief 3 Adhoc meetings and 1 public workshop	11/10/06	4/12/07																			

Project Schedule Sample

## Section II, Specifications

d. The Consultant shall develop, maintain, and provide to the City Project Manager monthly progress memos as well as biweekly verbal updates that address the progress of work, public outreach schedule and budget, information/decisions required to maintain the project schedule and complete deliverables, problems encountered that may affect the schedule, budget, or work products, and anticipated work, action items, and review activities for the following month.

RESPONSE: Collaborative Services will develop, maintain, and provide to the City Project Manager written monthly progress memos to accompany our invoice as well as biweekly verbal updates that address the progress of work. These updates will report: public outreach schedule and budget; information/decisions required to maintain the project schedule and complete deliverables; problems encountered that may affect the schedule, budget, or work products; and, anticipated work, action items, and review activities for the following month. The progress memos and updates will document items that have been recently completed, in progress, and list out next steps.

e. The Consultant shall provide quality control of all products prior to submittal to the City, shall ensure that all work is completed and deliverables provided on time according to the project schedule, and that all progress memos, agendas, and meeting minutes are technically accurate.

RESPONSE: Collaborative Services follows a quality control process for deliverables prior to their submittal to the City. This process ensures that all work is completed and deliverables provided on time according to the project schedule, and that all progress memos, agendas, and meeting minutes are technically accurate. All products go through an internal review process by the Project Manager and Principal of the Firm. Collaborative Services also understands that there will be a client review process as well, which will be determined at the beginning of the project. The client review and approval process is tracked and followed before deliverables are made public.

### 2. Community Outreach, Meeting Facilitation, and Public Participation

a. The selected Consultant must demonstrate strong meeting facilitation skills and experience on projects of similar scope and size to the requirements and deliverables specified in this RFP.

RESPONSE: Collaborative Services has strong meeting facilitation skills and experience on projects of similar scope and size to the requirements and deliverables specified in this RFP. Ms. Smith, President of the Firm and Principal in charge of outreach, is a trained mediator and skilled facilitator. Designing the meeting, conducting the meeting, and documenting public input are important components of facilitation. When designing a workshop, several layouts are proposed showing various ways to present information and solicit input. Staff members also have training and experience with actively listening to the community, facilitating an engagement process, and developing creative solutions to community involvement, facilitation and public awareness programs.

## Section II, Specifications

b. The selected Consultant shall work with various public participants and stakeholders to identify land use issues and values that will guide the plan update process.

RESPONSE: Ms. Smith has a Juris Doctorate degree from the University of San Diego School of Law and has worked as trained mediator and facilitator for the San Diego Mediation Center, now known as the National Conflict Resolution Center. With her legal background, she is able to understand the myriad of legal, political, economic, and equity issues at play in redevelopment.

As public involvement is inclusive of all members of our community, Collaborative Services works on a daily basis with:

Political Leaders	Individual Property Owners	Migrant Services
Community Leaders	Contractors	Renters Associations
Translators	Neighborhood Leaders	Individual Residents
Journalists	BIDs	Individual Merchants
Media/Reporters	Chambers of Commerce	Individual Corporation School Districts
Parents, Teachers, Students	Transportation Planners	Community Planning Groups
Builders & contractor	Town Councils	Neighborhood Policing Immigrants
Planning Commissions	Professional Organizations	Architects, Engineers, Developers
Ad Hoc Committees	Urban Planners	Technical Advisors
Historians	Field Engineers	Environmental Consultants
Museums	Artists	Advertising Agencies
Special Events Coordinator		

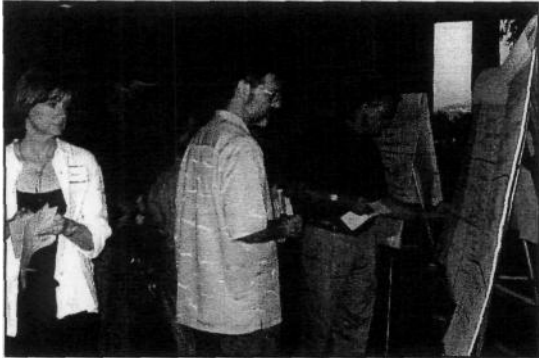
Collaborative Services also has previous work experience with traditionally under-represented groups to help agencies include members of the community who have historically lacked the opportunity or understanding of how to participate in decisions that will impact them. Collaborative Services involves traditionally under-served populations by working with non-profit, community-based organizations, schools, faith-based organizations and translators. By partnering with these sources of information, we are able to provide information that these under-served stakeholders can access and trust.

c. The selected Consultant shall gather input from community meetings, charrettes, and workshops and synthesize the input to inform the creation of new plan goals, objectives, recommendations, and plan alternatives.

RESPONSE: Collaborative Services will gather input from community meetings, charrettes, and workshops and synthesize the input to inform the creation of new plan goals, objectives, recommendations, and plan alternatives. There are various ways to gather input. Whether its a comment card, breakout group discussions, illustrating opportunities and constraints, or writing ideas on a board, Collaborative Services will provide several options for the project team to select, develop, and implement the process

## Section II, Specifications

most suited to each project's needs. Once the input is gathered at the workshop, Collaborative Services will transcribe the input and consolidate the information in a useable format for the project team to consider in the plan development. This input can be provided in several formats ranging from exact transcription of notes to categorizing the input in particular categories or priorities.



City of El Cajon Specific Plan Workshop



City of San Diego Southeastern San Diego Workshop

d. The selected Consultant shall work to build consensus among public participants and stakeholders regarding new plan goals, objectives, recommendations, and plan alternatives.

RESPONSE: Collaborative Services will help to build consensus among public participants and stakeholders regarding new plan goals, objectives, recommendations, and plan alternatives. Our firm understands and respects the knowledge of the community and before any communication with stakeholders, we will review the existing community plans and the City's General Plan. Then, we will develop an outreach plan that will involve neighborhood leaders and representatives early and often through the formation of the Stakeholder Advisory Committee, Cluster Update Advisory Committee, and Historic Resources Project Working Group. We have experience working with advisory committees in our City of Oceanside Transit Oriented Development Study and Midway Pacific Corridor Community Plan Amendment projects.



City of El Cajon Specific Plan Walking Tour Participants



City of San Diego Safe Routes To School Workshop Participants



## Section II, Specifications

e. The selected Consultant shall be required to work with City staff at the onset of the project to develop and refine the outreach strategy and to prepare a schedule to implement the various phases and tasks for the community update process. The outreach strategy that the Consultant shall prepare, may include, but is not limited to the following:

- (1) Monthly Stakeholder Advisory Group and Cluster Update Advisory Committee meetings
- (2) Public workshops - minimum of six (6) for each community planning area
- (3) One (1) Charrette process (up to six (6) days in the length) for each community planning area
- (4) Focus/working group meetings - One (1) for each community
- (5) Walk audits - One 1 for each community
- (6) Community surveys
- (7) Presentations/updates to public officials - Two (2)

The Consultant Team shall provide input to City staff on the following:

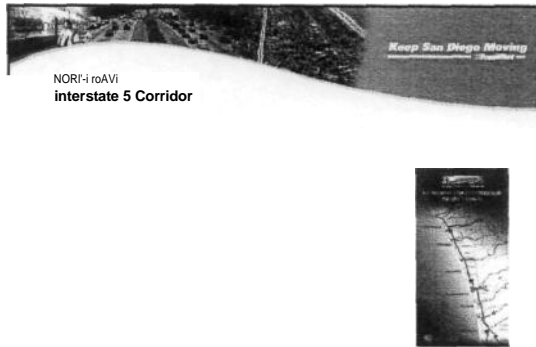
- (1) Project website
- (2) Project information brochure
- (3) Regular project newsletters
- (4) Visual displays
- (5) Media participation through interviews, public service announcements, etc.

RESPONSE: Collaborative Services will work with City staff at the onset of the project to develop and refine the outreach strategy and to prepare a schedule to implement the various phases and tasks for the community update process. Typically, we attend a project kick-off meeting and research the existing project information to determine the goals of the project. We then develop a communication and outreach plan and timeline that reflect the work items necessary to achieve project goals. Each time we meet with the project team, this plan can be reviewed and updated to incorporate new info or changed conditions.

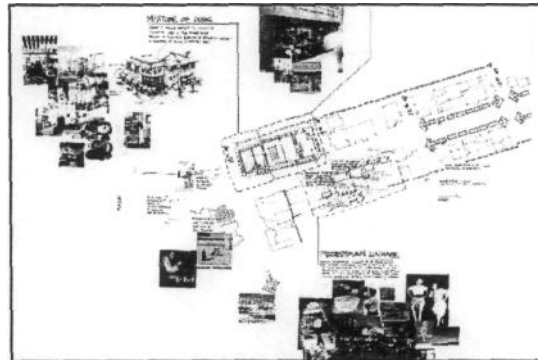
Collaborative Services is familiar and has experience with the various community involvement strategies listed in the RFP: advisory committee meetings, public workshops, charette process, focus/working group meetings, walk audits, community surveys, and presentations to public officials.

To support engagement, Collaborative Services also produces and provides project collateral materials. Our firm has worked on project websites, informational brochures, project newsletters, visual displays, and media participation. We are skilled in translating technical information into information that a variety of audiences and readers can understand and use. For any collateral work product that is developed, Collaborative Services has several processes that it follows to deliver accurate information in a timely way, such as the review and editing process; vendor and project team coordination; and, noticing and distribution of any project materials.

## Section II, Specifications



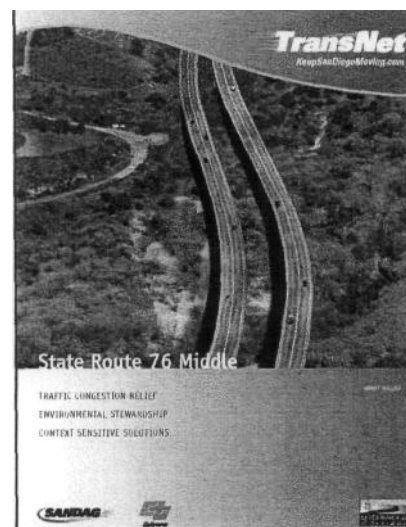
Project Website: 1-5 Corridor  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design



Visual Displays: Del Mar Village Vision Board  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design



Project Newsletter: 1-5 Corridor  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design



Project Information Brochure: State Route 67  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design

f. The Consultant, together with the City of San Diego, shall work with all three (3) Stakeholder Advisory Committees and the Cluster Update Advisory Committee, which the City of San Diego will organize, and shall encourage extensive community input and involvement through public workshops and informational presentations. The Consultant shall facilitate and conduct the meetings. The Consultant shall have a minimum of 3 years experience in working with citizen and professional organizations within the urbanized communities. The process shall allow input from all those affected by the update, reach out to those often under-represented in the decision-making process, and provide feedback representative of the community at large.

## Section II, Specifications

**RESPONSE:** We have over 13 years of experience in working with citizen and professional organizations within the urbanized communities. Collaborative Services will work with the City of San Diego, and work with all three (3) Stakeholder Advisory Committees and the Cluster Update Advisory Committee, which the City of San Diego will organize, and shall encourage extensive community input and involvement through public workshops and informational presentations. Collaborative Services will also facilitate and conduct the meetings.

As an example of working with ad-hoc/advisory committees, we have worked in the City of Oceanside Transit-Oriented Development (TOD) Study on a series of 6 ad-hoc meetings. The ad-hoc committee was an integral part of preparing for the community meetings and also resourceful in the review process of the study.

Meeting 1 :

- > Introduce the goals of the study and project team
- > Preview the status of the commuter line
- > Review the timeline and process of community involvement and planning services
- > Review the 1st community workshop

Meeting 2:

- > Take a walking tour of Little Italy to introduce to the group to a neighborhood where mixed-use development was implemented and functional

Meeting 3:

- > Review their progress
- > Debrief the Little Italy walking tour
- > Review the community involvement input
- > Describe the conceptual design process and final community workshop

Meeting 4:

- > Review the summary of comments by element
- > Review graphics for each element of successful TOD

Meeting 5: > Meet and learn from the Chula Vista E Street TOD team

- > Review outreach to date
- > Review the final community workshop preparation

## Section II, Specifications

### Meeting 6:

- >Review the project to date
- >Debrief and summarize the community workshop
- >Review draft documents
- >Determine next steps of the project
- >Debrief the ad-hoc process.

As mentioned previously, Collaborative Services has previous work experience with traditionally under-represented groups to help agencies include members of the community who have historically lacked the opportunity or resources to participate in decisions that will impact them. Collaborative Services involves traditionally under-served populations by working with non-profit, community-based organizations, schools, faith-based organizations and translators. By partnering with these sources of information, we are able to provide information that these under-served stakeholders can access and trust. At another level, Collaborative Services also partners with politico , organizational, and jurisdictional leaders to heighten the awareness of the project and publicize the opportunity for community participation. In addition, we partner with the press and media to assist in publicizing workshops events and the progress of the project.

rks

City of Oc<n>jd< Traimll Qrt.m.d D'v<lopm<it Stui

City of Oc<iuld< Tranillt OHmtad D'v<lopm'nt Study  
Ad Hoc M'>ting #2  
LittfnayWalkmg tour

H0 an Topic Ltw'Wortl Dvlgfppnll

City of Oceanside: Ad-Hoc Meeting #1 Agenda

City of Oceanside: Ad-Hoc Meeting #2 Agenda

Collaborative Services

## Section II, Specifications

### **B. DELIVERABLES**

#### 1. Project Administration

a. The City Project Manager shall provide the Consultant with a draft community plan update/public outreach and involvement schedule.

RESPONSE: Collaborative Services will review the community plan update/public outreach and involvement schedule given by the City Project Manager and recommend ways to integrate the outreach work items and milestones, so that involvement is integrated into the project's decision-making process.

b. The Consultant shall collaborate with the City Project Manager to refine the draft community plan update schedule as it relates to the public outreach component of the plan update process to reflect the anticipated 24 month processing schedule i.e. time anticipated to reach the first public hearing to consider a formal recommendation on the Community Plan Update process).

RESPONSE: Collaborative Services will collaborate with the City Project Manager to refine the draft community plan update schedule as it relates to the public outreach component of the plan update process to reflect the anticipated 24 month processing schedule. The way to ensure that work items are efficiently completed on time is to work hand in hand with the City Project Manager in progress meeting and regular correspondence regarding work items that are completed, pending, and next to be completed. Agenda and meeting minutes help to track progress.

c. The Consultant shall update the schedule on a bimonthly basis and provide it to the City Project Manager and other affected parties.

RESPONSE: Collaborative Services will update the schedule based on a bimonthly basis and provide it to the City Project Manager and other involved parties. Information will be updated based on decisions being made by the project team, the progress of work items, and new information that becomes available through the plan development.

d. Consultant shall participate in regular community plan update coordination meetings with City staff, to be determined/scheduled by City Project Manager.

RESPONSE: Collaborative Services will participate in regular community plan update coordination meetings with City staff. While the meetings are determined and scheduled by the City Project Manager, Collaborative Services will coordinate its schedules to ensure time to prepare and attend these meetings. These meetings are opportunities to earn and share existing and new information, make decisions, discuss challenges, develop creative solutions, and adjust timelines as necessary.

## Section II, Specifications

### 2. Community Outreach, Meeting Facilitation, and Public Participati

a. Consultant shall develop and prepare community outreach and public participation strategy with City staff. Dates/times of the workshops will be scheduled in coordination with City Project Manager to achieve the greatest eve of stakeholder and public participation.

RESPONSE: Collaborative Services will develop and prepare community outreach and public participation strategy with City staff. Dates/times of the workshops will be scheduled in coordination with the City Project Manager to achieve the greatest level of stakeholder and public participation. Collaborative Services will design several layouts for workshops and community outreach strategies. These options will be discussed with the project team to refine it into the workshop format it wants to implement. Our firm will a so coordinate event logistics and will review with the team an event checklist to make sure that all team members understand their roles and responsibilities for event noticing, press and media coordination, advisory meetings, and workshop and charette events.

b. Consultant shall collaborate with City Project Manager to develop and implement a media strategy for various phases of the Community update process.

RESPONSE: Collaborative Services will collaborate with the City Project Manager to develop and implement a media strategy for various phases of the community update process. Press and media are valuable stakeholders in the community and people often refer to them as reliable sources of information. We have experience working with local, neighborhood, and regional media for various projects. Typically, we draft 3 press releases per event: announcing each community event, summarizing the community event, and describing the success of the community involvement effort. Our firm can pitch the project to the media and arrange interviews for the project team. In conjunction with the project, we also determine the project spokesperson in preparation for possible media coverage of community workshops or the charette. Additionally, we can develop practice media questions, answers, and talking points to make sure each team member can provide the same and consistent information to the public.

ion



Del Mar TV Filming Workshop

Take the Next Step to...  
Rmulla D=I Mar's Village by joining  
togMhir tor Public Workshop 112

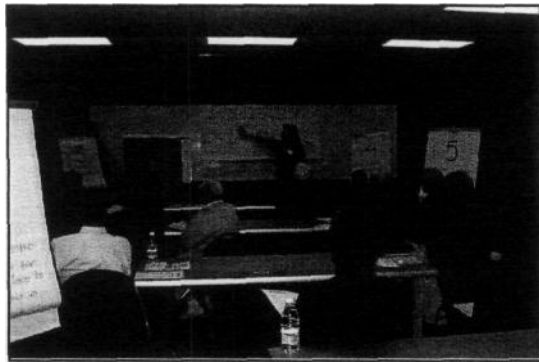
del ni a j

Del Mar Workshop Ad

## Section II, Specifications

c. Consultant shall conduct one (1) community workshop to educate and introduce stakeholders to the community planning update process for each community planning area. The workshop shall be up to four (4) hours in length.

**RESPONSE:** Collaborative Services will conduct one 1) community workshop to educate and introduce stakeholders to the community planning update process for each community planning area. Through having this meeting, everyone can begin at the same starting point and build towards a shared vision through this process.



Southeastern San Diego Workshop #2



Midway Pacific Corridor Workshop #2

d. Consultant shall conduct one (1) community-wide survey to identify issues and needs for each community planning area.

**RESPONSE:** Collaborative Services will conduct one (1) community-wide survey to identify issues and needs for each community planning area. A draft of the survey will be created by our firm, and reviewed and approved by the project team members before distributing.

### cityworks

Ad Hoc Memo'n

City of Oceanside: Stakeholder Interview Introduction

City of Oceanside: Stakeholder Interview Questions

Collaborative Services

## Section II, Specifications

e. Consultant shall facilitate and conduct the meetings. The Consultant shall have a minimum of 3 years experience in working with citizen and professional organizations within the urbanized communities.

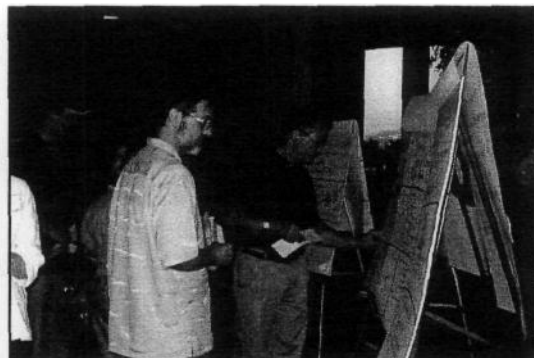
RESPONSE: Collaborative Services staff can demonstrate strong meeting facilitation skills and experience on projects of similar scope and size to the requirements and deliverables specified in this RFP. With over 13 years of facilitation experience, Ms. Smith, President of the Firm and Principal in Charge of Outreach, is a trained mediator and skilled facilitator. Staff members also have experience managing over engagement of the community and developing creative solutions through community involvement, facilitation and public awareness programs. Each of the staff member has experience working with citizen and professional organizations within the urbanized communities as our projects range in various size, scope, and locations.

f. Consultant shall conduct one (1) public workshop in order to establish community issues and overall vision desired by the community for each community planning area. The workshop shall be up to (4) four hours in length.

RESPONSE: Collaborative Services will conduct one (1) public workshop in order to establish community issues and overall vision desired by the community for each community planning area. Our firm will design several layouts for the workshop and community outreach strategies that will be discussed with the project team and refined into a final workshop format. Our firm will also coordinate event logistics and review with the team an event checklist to make sure that all team members understand their roles and responsibilities for event noticing, press and media coordination, and day-of coordination, as well as roles and responsibilities during the event for greeting, leading, presenting, and documenting.



City of El Cajon Walking Tour



City of El Cajon Prioritizing Ideas



## Section II, Specifications

g. Consultant shall conduct one ( 1 ) charrette process for each community planning area and collaborate with other technical consultants, as hired by the City. The charrette shall be up to 6 days in length.

RESPONSE: Collaborative Services will conduct one (1) charrette process for each community planning area and collaborate with other technical consultants, as hired by the City. Our firm will design several layouts for the charette and community outreach strategies that will be discussed with the project team and refined into a final workshop format. Our firm will also coordinate event ogistics and review with the team an event checklist to make sure that all team members understand their roles and responsibilities for event noticing, press and media coordination, and day-of coordination, as well as roles and responsibilities during the event for greeting, leading, presenting, and documenting.

# C

cityworks

. cii

Event Preparation Checklist  
- Womano 12

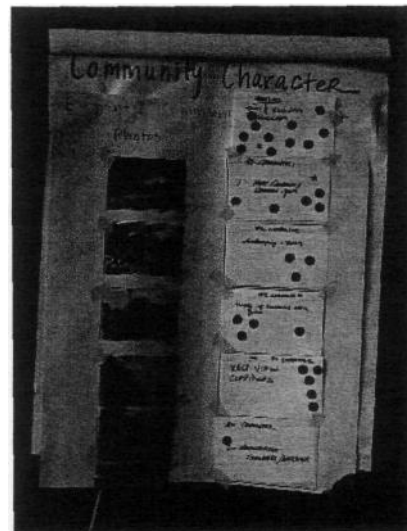
Poom-rouse CaromHiv CerilB

B Item Design and Layout  
C Plan B AlamaWB Plan for Cert/Wv  
D Scafulleg  
E Confirmation vt MeWig Heswvator  
- -1-...-1 MaUn  
G Mate\*\* orepafalions  
H Agenda  
< Pies\*

Day: S+up at Pot'mous\*

Point-o-Contat LmDa Hres. Plopa  
Mansin Plo\*\*  
1858755-9113 Email  
<Minimg@delmar.u il

City of Del Mar: Event Checklist Cover Page



City of Del Mar: Community Character Board

h. Consultant as part of a multi-disciplinary team dedicated to assisting City staff with the update, shall interface and collaborate with other technical consultants of the team to review, comprehend, and summarize analysis results in addition to stakeholder input so that they may be relayed in within public discussions to inform the update process.

RESPONSE: Collaborative Services will interface and collaborate with other technical consultants of the team to review and summarize analysis results in addition to stakeholder input so that they may be relayed in within public discussions to inform the update process. Collaborative Services has experience coordinating with other technical consultants on the project team. Through its work, Collaborative Services is skilled at translating technical information into information a variety of audiences and readers can understand about the community plan update document. The process and skills essential to providing the community information will help facilitate quality input.

## Section II, Specifications

i. Consultant shall attend and participate in monthly stakeholder meetings for each community planning area on issues, goals, priorities, elements and land use plan. Consultant shall furnish meeting agendas and minutes to city staff and stakeholders.

RESPONSE: Collaborative Services will attend and participate in monthly stakeholder meetings for each community planning area on issues, goals, priorities, elements and land use plan. Consultant shall furnish meeting agendas and minutes to city staff and stakeholders as a way for the group to track progress and next steps.

j. The remaining four (4) workshops shall be topical, dealing specifically on plan elements and/or reflect phases of plan refinement, and shall be highly interactive and consensus-based.

RESPONSE: Collaborative Services will create the remaining four (4) workshops with a topical emphasis, dealing specifically on plan elements and/or reflect phases of plan refinement. These workshops will be designed to encourage interactive participation and promote consensus building. As part of developing the communication outreach plan, Collaborative Services will program topics for these meetings, as we have previously demonstrated in our work with the City of Oceanside, City of E Cajon and City of San Diego.

As an example, we have worked with the City of El Cajon to plan out 3 workshops and 1 optional workshop in helping to develop a Downtown Specific Plan. The goal of the first workshop was to inform the community about existing and expanded areas as well as introduce them to the 9 Elements of a Successful District. This goal was accomplished with a presentation, walking tour and a review the District 2 area. Visual boards were also set up for other project areas just in case people wanted to comment on other existing areas. The goal of the second workshop was to involve the community in the visioning process for 5 new districts, so that priorities can be set and shared. This was accomplished through working in small groups to prioritize ideas by the 9 elements of a successful district using star and dot stickers and then share ideas with the groups. The third workshop's goal was to present all the conceptual design concepts for all districts and gain feedback to consider in final revision and future documentation. There was an overall presentation made and group rotations for reviewing concepts. Then, the group shared their feedback with one another. In an optional 4th workshop, the community will have a sneak peak at the draft Specific Plan. This allowed the project team to answer questions here rather than have questions posed at the City Council presentation. This workshop was set up as an information meeting to meet the experts on topics such as: infrastructure, financing, planning, transit, traffic and design. An Ad Hoc Committee meeting structure paralleled this workshop process. The planning for the Ad Hoc Committee process is shown on the next page.

## Section II, Specifications

M\* O<sup>200</sup> g<sup>200</sup> Da-slop bed, informed odvocates for the Downtown Specific Plan - updated | 1.29.07

City of El Cajon: Ad Hoc Process

k. Spanish translation shall be furnished for all materials and workshop sessions. Materials must also be available in different formats upon request by the City.

RESPONSE: Collaborative Services will provide Spanish translation for all materials and workshop sessions. Our firm has brought on board Translation Solutions to provide verbal and written translation services. Additionally, we have staff members who are bilingual in Spanish and English who can draft or proof materials. Collaborative Services can a so provide material in different formats upon request by the City, such as electronic or hard copy formats.

Collaborative Services

**C. QUALIFICATION AND EXPERIENCE**

1 . Consultant shall describe experience in completing consulting efforts and present consultant qualifications that are similar in scope and size to the requirements and deliverables of the RFP. For each team member, describe in detail three (3) successfully completed similar projects. For each completed project, provide the name of the jurisdiction and Project Manager the Consultant performed work for, address, telephone number, type of work performed, and dollar value of the contracts. A project currently being performed may be submitted for consideration as one of the references.

**RESPONSE:**

Collaborative Services has completed consulting efforts and presented consultant qualifications that are similar in scope and size to the requirements and deliverables of the RFP. Following are projects that we have worked on and are currently working on that demonstrate our capability of providing professional public outreach, involvement and facilitation services. Project Profiles have also been inserted.

Project 1: Midway Pacific Corridor Community Plan Amendment & Design Guidelines

Name of Jurisdiction:

City of San Diego Community Development

Project Manager:

Kevin Sullivan, Community Development Director

Address:

City of San Diego 202  
C St., 4th Floor San  
Diego, CA92101

Telephone:

619.236.7173

Type of Work Performed:

- >Designed, prepared, conducted three community workshops
- >Presented to four community planning group meetings and the planning commission.
- >Prepared notice to residential communities, community-based groups and organizations (YMCA, Optimist Club), business groups and businesses, jurisdiction and regional stakeholders
- >Developed a "Guide for Guides" and trained Community Planning Group members to be hosts of walking tour with community members
- >Conduct telephone survey with 25 key stakeholders prior to events
- >Prepared a conceptual community-based vision and plan

## Section II, Specifications

Dollar Value of Contract: \$200,000

Project 2: City of Oceanside Transit-Oriented Development Study

Name of Jurisdiction:

City of Oceanside, Planning Department

Project Manager:

Jerry Hittleman, Acting Planning Director

Address:

City of Oceanside, Planning Department

330 Coast Highway Oceanside, CA

92054

Telephone:

760.435.3535

Type of Work Performed:

- >Designed and facilitated 3 community workshops
- >Designed and facilitated 6 Ad Hoc Meetings
- >Designed and implemented survey with 100 stakeholders
- >Identified and outreached to traditionally non-represented stakeholders
- >Provided publicity via neighborhood, local and regional publications
- >Developed community-based plan for 1 /4 mile demonstration site at future South Coast transit stations
- >Designed walking tour maps and presentation boards
- >Prepared PowerPoint presentations, a general plan, local coastal program amendments, and final report with summary and recommendations, transit-oriented zoning overlay

Dollar Value of Contract: \$200,000

Project 3: National City Harbor District Master Plan & Design Guidelines

Name of Jurisdiction:

City of National City, CDC

Project Manager:

Paul Desrochers, Executive Director

## Section II, Specifications

Address:

City of National City, CDC  
1243 National City Blvd.  
National City, CA91950

Telephone:

619.336.4250

Type of Work Performed:

- >Conducted 3 workshops
- >Hosted a design "charette" to improve the district and seek input on the current strengths and weaknesses of the area
- >Created developer RFP package and facilitated a workshop for developers at the redevelopment opportunities and process parcels
- >Developed Preliminary Analysis Report, Recommendations Report, Master Plan, and Design and Development Guidelines
- >Research of Other Similar Districts & Stakeholder Intentions of Leaders from those districts

>Involved:

- >Port of San Diego
- >NTC (Naval Training Center)
  - »MTDB (Metropolitan Transit Development Board)
- >CalTrans
- >Southern Pacific Railway
- >National City Mayor George Waters; Councilmembers Ron Morrison, Mitch Beauchamp, Fred Soto, and Nick Inzunza; Planning Director Roger Post; San Diego Regional Technology Alliance Joe Raguso; Border Environmental Business Cluster Joyce Sheean; Sierra Club; Chula Vista; Imperial Beach; Coronado
- >Consulting Team
- >Developers
- >Rail and Tourist Attractions
- >Businesses
- >Residents
- >Schools
- >Customers
- >Historic and Cultural Interests
- >Property Owners
- >Identified other attractions such as schools, restaurateurs, and hoteliers for potential research and interviews

## Section II, Specifications

Dollar Value of Contract: \$200,000

Project 4: SANDAG Bicycle Master Plan and City of San Diego Pedestrian Master Plan

Name of Jurisdiction:

SANDAG and City of San Diego Planning and Community Investment Department

**Project Manager:**

Sherry Ryan, Transportation Planner

Address:

Alta Planning + Design  
3920 Conde St., Unit B  
San Diego, CA921 10

Telephone:

858.349.5330

**Type of Work Performed:**

- >Defining and developing community outreach strategies
- >Coordinating event logistics
- >Providing assistance to develop collaterals
- >Scheduling workshops
- >Designing workshop layout and structure
- >Photodocumenting workshops as well as prepare written documentation of input
- >Facilitating workshops

Dollar Value of Contract: \$20,000 Project

5: Infrastructure Impact Program

Name of Jurisdiction:

City of San Diego Economic Development & Community Services Department

**Project Manager:**

Meredith Didben Brown, Project Manager

## Section II, Specifications

Address:

City of San Diego 600  
B Street, 4th Floor San  
Diego, CA92101

Telephone:

619.685.1385

Type of Work Performed:

- > Provided direct one-to-one outreach with business owners
- > Created project updates for the community
- ^ Facilitated weekly update meetings between City staff, BID leadership, and contractors
  - > Prepared meeting agendas
  - † Write facilitation summaries
- > Reviewed contractor specifications and made recommendations to City Resident Engineer for how to mitigate impacts of construction
- > Developed business top 10: impact mitigation planning
  - » Negotiated impact mitigation and change order agreements

Dollar Value of Contract: Individual contracts between \$15,000 - \$30,000



## Project Profiles

### Midway Pacific Corridor Community Plan Amendment & Design Guidelines

Client: City of San Diego  
Community Development

Date awarded: June 2004

Completion date: February 2006

Contact:

Kevin Sullivan  
Community Development Director  
City of San Diego  
202 C St., 4th Floor  
San Diego, CA 92101  
619.236.7173

Firm's Project Manager: Catherine  
Smith

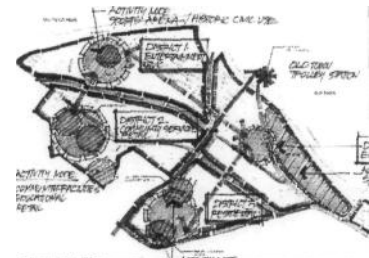
\$200,000

Contract Amount:

**Project Description:** As joint-venture partner to CityWorks, Collaborative Services led an effort to create an amendment to the Midway Community Plan for the Midway Pacific Corridor project area. This amendment was initiated in response to the desires of both community stakeholders and the City of San Diego City Council to remove the Bay-to-Bay plan from the Community Plan and to implement the City of San Diego's Strategic Framework Element. The design team integrated the community input into a master plan that would transform this regional shopping district into six mixed-use neighborhood-oriented districts. Each district would be defined by activity nodes that would catalyze redevelopment in those areas. From this, zoning designations, environmental analysis and jurisdictional approvals could be pursued.

**Services Include:**

- >Designed, prepared, conducted three community workshops
- >Presented to four community planning group meetings and the planning commission.
- >Prepared notice to residential communities, community-based groups and organizations (YMCA, Optimist Club), business groups and businesses, jurisdiction and regional stakeholders
- >Developed a "Guide for Guides" and trained Community Planning Group members to be hosts of walking tour with community members
- >Conduct telephone survey with 25 key stakeholders prior to events
- \*Prepared a conceptual community-based vision and plan



Activity Nodes and District Diagram



Community Involvement at Workshop #1



Breakout Groups at Workshop #3

## City of Oceanside Transit-Oriented Development Study

Client: City of Oceanside

Planning Department

Date awarded: September 2002

Completion date: February 2003

Contact:

Jerry Hittleman  
Acting Planning Director  
City of Oceanside, Planning Dept.  
330 Coast Highway  
Oceanside, CA 92054  
760.435.3535

Firm's Project Manager: Catherine Smith  
619-232-2112

Contract Amount: \$200,000

Project Description: As joint-venture partner to CityWorks, Collaborative Services role on their project was to educate the public about the benefits of transit-oriented developments while involving them in defining the potential for this kind of redevelopment around the quarter-mile radius around each of the seven Sprinter sites. The South Coast Highway site and its quarter-mile radius was designated as the demonstration study site and was planned in more detail.

Services Include:

- > Designed and facilitated 3 community workshops
- > Designed and facilitated 6 Ad Hoc Meetings
- > Designed and implemented survey with 1 00 stakeholders
- > Identified and outreached to traditionally non-represented stakeholders
- > Provided publicity via neighborhood, local and regional publications
- > Developed community-based plan for 1/4 mile demonstration site at future South Coast transit stations
- > Designed walking tour maps and presentation boards
- > Prepared PowerPoint presentations, a general plan, local coastal program amendments, and final report with summary and recommendations, transit-oriented zoning overlay



Transit Corridor and Station Areas within Oceanside



Walking Tour at Community Workshop #1



Community Participation at Community Workshop #1

## National City Harbor District Master Plan & Design Guidelines

Client: City of National City, CDC Date awarded:

Contact: Paul Desrochers  
Executive Director  
City of National City, CDC  
1 243 National City Blvd.  
National City CA91950  
619.336.4250

Completion date: October 2002  
Firm's Project Manager: Catherine Smith  
619-232-2112

Contract Amount: \$200,000

Project Description: As joint-venture partner to CityWorks, Collaborative Services engaged the NCHD community in this planning project. The goal of the project was to gracefully join two seemingly different land uses - recreational uses and industrial uses. The recreational area included the future development of a marina complimented by recent improvements such as a park, a restored nature preserve and streetscape improvements. The entry to this recreational area includes a recently renovated historic train depot and mostly vacant land that used to house industrial uses. To the north of this gateway spanning for several blocks are light industrial arts, heavy industrial, recycling, storage, harbor-related and residential uses.



Enlarged Site Plan

### Services Include:

- >Conducted 3 workshops
- \* Hosted a design "charette" to improve the district and seek input on the current strengths and weaknesses of the area
- >Created developer RFP package and facilitated a workshop for developers at the redevelopment opportunities and process parcels
- >Developed Preliminary Analysis Report, Recommendations Report, Master Plan, and Design and Development Guidelines
- >Research of Other Similar Districts & Stakeholder Intentions of Leaders from those districts
- † Stakeholder involvement with various residents, businesses, and organizations such as the Port of San Diego, NTC (Naval Training Center), MTDB (Metropolitan Transit Development Board, Caltrans, and Southern Pacific Railway.



Gateway Entry Perspective



Community Participation in Walking Tour

## Project Profiles

### SANDAG Bicycle Master Plan and City of San Diego Pedestrian Master Plan

Client: SANDAG and

City of San Diego  
Planning and Community Investment  
Department

Date awarded: 2008

Completion date: in Progress

Firm's Project Manager: Catherine Smith  
619-232-2112

Contact: Sherry Ryan Transportation Planner Alta  
Planning + Design 3920  
Conde St., Unit B San Diego, CA 92110  
858.349.5330

\$20,000

Contract Amount:

Project Description: As sub-consultant to Alta Planning + Design, Collaborative Services is providing community outreach and stakeholder involvement services for the SANDAG Bicycle Master Plan and the City of San Diego Pedestrian Master Plan projects.



Bicycle Master Plan Workshop  
at Carlsbad Senior Center

For the SANDAG Bicycle Master Plan, Collaborative Services designed and coordinated the same workshop that was held in two separate locations for convenience and thorough input throughout the county. This workshop helped to establish any gaps, desired routes, and frequently traveled bicycle patterns in San Diego County. This workshop also reviewed the goals of this Plan, the projects and program funding sources, existing network, and the status of bicycle planning.



Bicycle Master Plan Workshop Participants

For the City of San Diego Pedestrian Master Plan, Collaborative Services will be working with communities to solicit input on pedestrian improvements in: Greater North Park, Southeastern San Diego, Greater Golden Hill, Uptown, Normal Heights, Barrio Logan, City Heights, San Ysidro, Midway-Pacific Highway, and Old San Diego.



Bicycle Master Plan Workshop at  
Balboa Park's Hall of Champions  
Sports Museum Board Room

Services Include:

- > Defining and developing community outreach strategies
- > Coordinating event logistics
- > Providing assistance to develop collaterals
- > Scheduling workshops
- > Designing workshop layout and structure
- > Photo-documenting workshops as well as prepare written documentation of input
- > Facilitating workshops

## Project Profiles

### Infrastructure Impact Program

Client:

City of San Diego Economic  
Development & Community  
Services Dept.

Date awarded:

Various

Completion date:

Ongoing

Firm's Project Manager:

Catherine Smith

619-232-2112

Contact: Meredith Didben Brown Project Manager  
City of San Diego 600 B St., 4th Floor San  
Diego, CA 9 92101  
619.685.1385

\$15,000-\$30,000

Contract Amount:

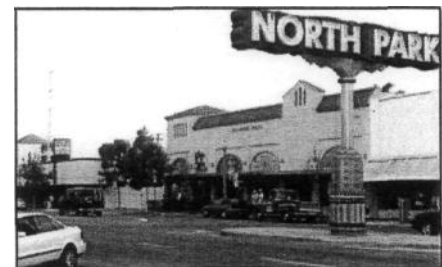
Project Description: The purpose of the Infrastructure Impact Program was to minimize the negative impacts on business districts that are created by the construction of streetscape, transit and public works improvements. Previous projects include: 5th Avenue Streetscape; University Avenue Streetscape; North Park Streetscape; El Cajon Blvd. Streetscape; Ventura Gateway Project; and the Pacific Beach Boardwalk Project.

Services Include:

- > Provided direct one-to-one outreach with business owners
- » Created project updates for the community
- > Facilitated weekly update meetings between City staff, BID leadership, and contractors
- > Prepared meeting agendas
- > Wrote facilitation summaries
- > Reviewed contractor specifications and made recommendations to City Resident Engineer for how to mitigate impacts of construction
- > Developed business top 10: impact mitigation planning
- > Negotiated impact mitigation and change order agreements



Uptown Streetscape



North Park Streetscape



5th Avenue Streetscape:  
Sidewalks and Storefronts

## Section II, Specifications

2. A primary objective of the project is to achieve community consensus on the preparation of the community plan update. The Consultant shall describe demonstrated public outreach and participation expertise (including samples of public outreach and participation materials, if appropriate) as well as experience with mediating conflicts and achieving consensus on similar projects. Further, the Consultant shall describe facilitation experience as well as working with member of a community to reach consensus and develop a plan.

RESPONSE: Collaborative Services is able to achieve community consensus on the preparation of the community plan update. As an example of building consensus with ad-hoc/advisory committees, we have worked in the City of Oceanside Transit-Oriented Development (TOD) Study on a series of 6 ad-hoc meetings. The ad-hoc committee was an integral part of preparing for the community meetings and also resourceful in the review process of the study. The meetings included:

### Meeting 1:

- > Introducing the goals of the study and project team
- > Reviewing the status of the commuter line
- > Reviewing the timeline and process of community involvement and planning services
- > Reviewing the community meeting

### Meeting 2:

- > Taking a walking tour of Little Italy to introduce to the group to a neighborhood where mixed-use development was implemented and functional

### Meeting 3:

- > Review their progress
- > Debrief the Little Italy walking tour
- > Review the community involvement input
- > Describe the conceptual design process and final community workshop

### Meeting 4:

- > Reviewing the summary of comments by element
- > Reviewing graphics for each element of successful TOD
- > Meeting and learning from the E street TOD team
- > Review outreach to date
- > Review the final community workshop preparation

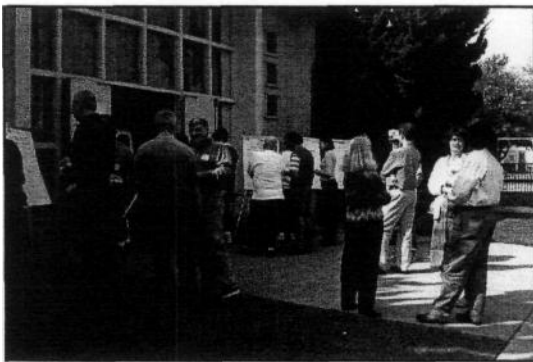
### Meeting 5:

- > Meet and learn from the Chula Vista E Street TOD team
- > Review outreach to date
- > Review the final community workshop preparation

## Section II, Specifications

### Meeting 6:

- > Reviewing the project to date
- > Debrief and summarize the community workshop
- > Review draft documents
- > Determine next steps of the project
- > Debrief the ad-hoc process.



City of Oceanside TOD Study Workshop #1



City of Oceanside TOD Study Workshop #2

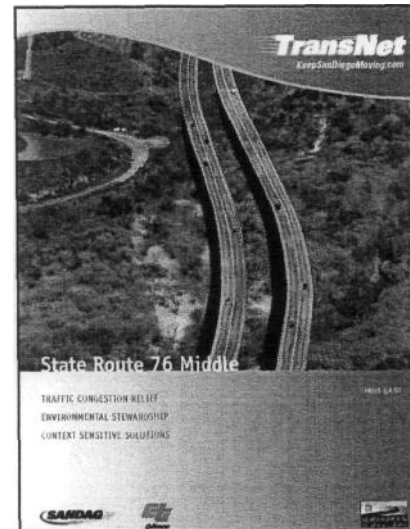
3. The Consultant shall be able to prepare materials, including but not limited to agendas, minutes, meeting notes, working papers, screen checks, correspondence, and final reports.

RESPONSE: Collaborative Services is able to prepare materials, including but not limited to agendas, minutes, meeting notes, working papers, screen checks, correspondence, and final reports. We provide agendas and meeting notes for all types of clients to make sure that work items are being completed in a timely and efficient manner. We have drafted working papers and reports for projects, such as the Transnet Early Actions Projects describing facts about sounds walls, a cliff notes version of an EIR report, and a Corridor System Management Plan. We work closely with our in-house design team, Warner Architecture + Design, to create these collateral materials.

## Section II, Specifications



Project Newsletter: 1-5 Corridor  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design



Project Information Brochure: State Route 67  
Created by CityWorks, joint-venture of  
Collaborative Services and Warner Architecture + Design

4. The Consultant shall describe their experience with involving the public and facilitating discussions on issues related to land use planning and urban design. Prior work in urban planning facilitation is desirable.

RESPONSE: Since 1991, Collaborative Services has been a partner to CityWorks, an urban planning firm. Collaborative Services' role is to provide community relations services so that communities can successfully create a shared vision for the future of their community and transition smoothly from planning into implementation.

One example of Collaborative Services' experience in public outreach related to land use and urban design, is the City of Oceanside Transit-Oriented Development Study. Collaborative Services actively educated the public about the benefits of transit-oriented developments while involving them in defining the potential for this kind of redevelopment.

5. The Consultant shall describe their understanding of the community's history, demographics, and issues and opportunities as well as its relationship to other neighboring communities.

RESPONSE: Collaborative Services has worked in neighborhoods of Council District 2 and 3 since the beginning of its business in 1995. We are familiar with the community planning groups, the Business Improvement Districts, the Community Development Corporations and the parking districts. We understand their roles and relationships and understand their goals relative to economic revitalization, historic preservation, and pedestrian-oriented environments.



## Section II, Specifications

We have worked directly with the Uptown Partnership on a previous strategic planning session. We have worked with the Business Improvement Districts in Mission Hills, Hillcrest, North Park during their streetscape programs and through their Board and organization structure changes.

We understand that it will be crucial to the success of each planning effort to help these stakeholder groups successfully interact with each other, share opportunities for input and ultimately provide ideas that will help the planning team make high quality plans that reflects each communities specific character and ong term goals. We have worked in a variety of planning efforts where the combination of stakeholder groups resembles the mix of stakeholder groups that are present in each of these three communities. We will develop a strategy with them and the City to create a process that they can trust, so that the plans that are developed through that process will also be trusted.

6. The Consultant shall have strong communication and observation skills, attention to detail, the ability to work independently, the ability to be responsive and flexible to input and direction from the community and staff.

RESPONSE: Collaborative Services staff have strong communication and observation skills, which enables an effective facilitation of community input. We also have an attention to detail, which enables us to review and conduct quality control on documents and project collaterals. Our firm can work independently and be responsive and flexible to input and direction from the community and staff.

7. The Consultant shall be comfortable with and articulate in public speaking situations, have the ability to express the ideas of others, and shall demonstrate awareness of professional behaviors and protocols through

RESPONSE: Through our training and experience with facilitation and outreach, Collaborative Services is comfortable with and can successfully articulate in public speaking situations. We have the ability to express the ideas of others, and shall demonstrate a level of professional behavior and protocols that result in high quality relationships and work product. For example, in the Midway Pacific Corridor Community Plan Amendment, Collaborative Services was the lead facilitator for breakout sessions in discussing ways to improve the corridor. Our firm worked with Community Planning Group to host stations and discuss with participants their likes, dislikes, and suggestions for the project. Our firm developed a training tool, the "Guide for Guides," which was provided to each Community Planning Group member to help prepare them to host the walking tour and debrief it.

## Section II, Specifications



Southeastern San Diego Workshop #2



Midway Pacific Corridor Workshop #2

8. Consultant shall be competent in use of standard computer technology. The format for all draft agendas and minutes shall be in Microsoft Word. The City shall not provide any training about how to perform any of the computer-related tasks required completing the requirements of this RFP.

RESPONSE: Collaborative Services is competent in the use of standard computer technology. Our work products are composed in programs such as Microsoft Office (Word, Excel, and Powerpoint), Microsoft Project, Adobe Creative Suite (Photoshop, Illustrator, and InDesign), and Quark Express.

9. The Consultant shall submit resumes of any additional staff or sub-consultants if applicable, who will be involved in the project including all contact information.

RESPONSE: As the President of Collaborative Services, Catherine Smith is involved in its management, marketing, and projects. Her leadership and management helps her project teams solve problems and develop solutions that are specific to their needs. She develops creative solutions to community involvement, facilitation and public awareness programs that are based on her clients' political climate, economics, community, and goals. Currently, she is working on a variety of sensitive projects including a long range community planning and redevelopment, construction of significant infrastructure improvements, and public awareness campaigns for water conservation and watershed protection.

Ms. Smith obtained her Bachelor of Arts in English degree in 1989 from the University of California, Berkeley. Following, she obtained her Juris Doctorate in 1997 from the University of San Diego School of Law in San Diego, California.

The Collaborative Services team focuses on creating trusted and credible stakeholder involvement programs for their clients and their community members. From one-to-one outreach to coordinating inter-jurisdictional teams to managing public awareness campaigns, their team is skilled at designing, managing and implementing the right stakeholder involvement process at the right time.

## Section II, Specifications

The Collaborative Services team consists of:

>K.C. Strong, Managing Associate	kcstrang@collaborativeservices.biz
>Destree Lazo fiascos, Managing Associate	destreel@collaborativeservices.biz
>Matthew Lea, Managing Associate	matthewl@collaborativeservices.biz
>Donna Ascano Peterson, Associate	donnaap@collaborativeservices.biz
>Kara Palmer, Project Assistant	karap@collaborativeservices.biz
>Louann Groening, Project Assistant	louanng@collaborativeservices.biz
>Jeff Wilson, Project Assistant	jwilson@collaborativeservices.biz
>Betty Stowe, Business Manager	bstowe@collaborativeservices.biz
>Cindy Velez, Business Assistant	cvelez@collaborativeservices.biz

Contact Information:

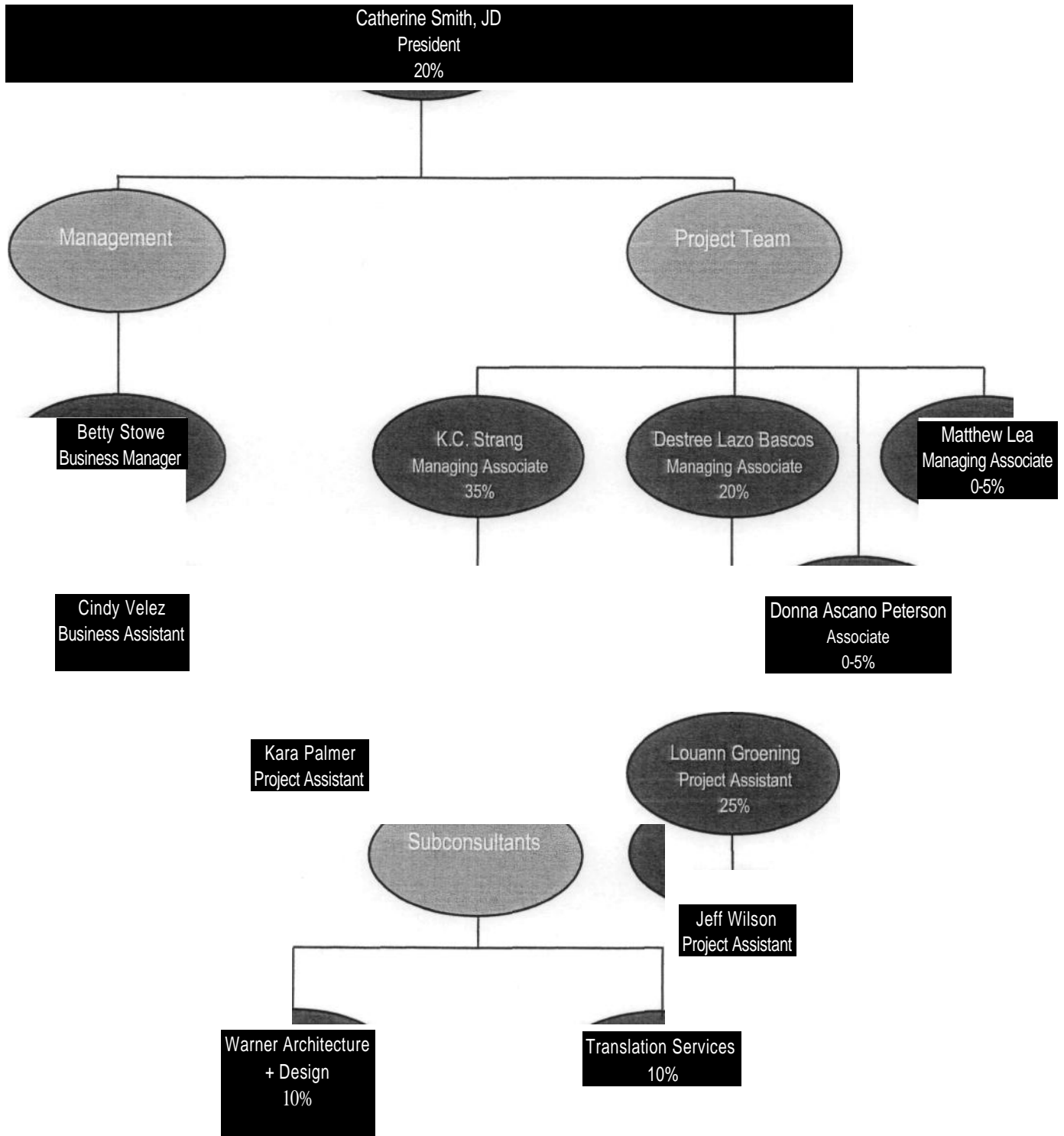
Collaborative Services  
427 C Street, Suite 200  
San Diego, CA 92101  
619.232.21 12

1 0. The Consultant shall provide a company/corporate organizational chart and staffing profile including subcontractors if applicable. The staffing profile shall include the leadership of the project team, the accountability of the Project Manager/Lead, the lines of authority and the identification of the day-to-day staff indicating by a percentage (%) as to whether they will be fully or partially assigned and dedicated to the Project. Less than full time dedication or one hundred percent (100%) of any members of the project team shall be explained.

RESPONSE: Catherine Smith will be the Principal-in-charge for this project with K.C. Strong as the lead Managing Associate to support her and to be the day to day contact for the City's Project Manager. The rest of the Collaborative Services team can be accessible to provide additional support and coverage.

Inserted here is the firm's organization chart and staff and subconsultant resumes.

# Proposed Team and Organization Chart





## Catherine Smith

JD, President, Collaborative Services; Partner, CiryWorks

### *What is your role within Collaborative Services?*

As the firm's President my role is to be involved in its management, marketing, and projects. In that role, I listen to my team and help them solve the problems our clients and community need solved. I develop creative solutions to community involvement, facilitation and public awareness programs that are based on our clients' political climate, economics, community, and goals.

### *Can you briefly summarize the projects that you are currently involved in?*

Currently, I am working on a variety of sensitive projects including long range community planning and redevelopment, construction of significant infrastructure improvements, and public awareness campaigns for water conservation and watershed protection. Daily, I am fortunate to work with SANDAG, Caltrans, the County and City of San Diego, as well as with independent water districts in San Diego and Riverside.

### *What motivates you and keeps you engaged in your work?*

Every day I know that our firm does something significant towards building trust between government and the community it serves. Over time, this trust-building has developed the respect of our clients and their communities in our team, that is hugely gratifying, as is seeing our team develop solutions that are truly unique.

### *What have been your most significant professional and personal accomplishments?*

Finishing law school and starting my business instead of becoming a practicing attorney is my most significant professional accomplishment. The business has a great team, great projects, and a great reputation for our services and ethics. Personally, my greatest accomplishment is still being friends with the folks I went to kindergarten with.

### *What makes you laugh?*

Finger puppets.

### *Please tell me a quirky fact about yourself.*

I love electronic erasers. As a kid, I used to go into my dad's architectural office, where my favorite pastime was erasing his plans.

**Education:** Juris Doctorate, 1 997  
University of San Diego School of Law, San Diego, California  
  
Bachelor of Arts English, 1989  
University of California, Berkeley, California

### **Successfully Completed Projects:**

City of San Diego Midway Pacific Corridor Community Plan Amendment:

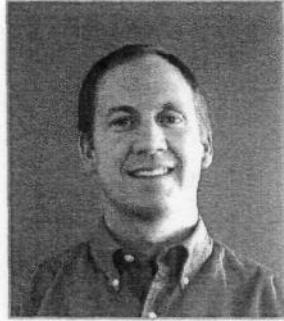
- >Managed 3 public workshops
- >Presented at 4 community group meetings
- >Conducted 25 interviews with community leaders

City of Oceanside Transit-Oriented Development Study:

- >Outreached to immigration schools
- >Outreached to middle school students
- >Facilitated 3 public meetings

City of National City Harbor District Master Plan & Design Guidelines:

- >Designed and led walking tour
- >Conducted developer forum
- >Presented to Planning Commission and City Council



## **K. C. Strong**

Managing Associate

*What is your role within Collaborative Services?*

As a Managing Associate, I will be managing and providing community involvement services. With over 10 years of experience, I am highly skilled in stakeholder involvement, community relations, public policy, conflict management, and problem solving.

*Can you briefly summarize the projects that you are currently involved in?*

I am primarily working on the City of San Diego Think Blue campaign, Storm Water Pollution Prevention, and Water Conservation Programs to coordinate press and media, involve and educate the community, and develop communication strategies and outreach plans.

*What motivates you and keeps you engaged in your work?*

It is important to me to be part of the solution to our communities problems; to work collectively bringing people together to improve our communities where we live, work, and play. So, hopefully, we can leave our communities in a healthier state for generations to come. It is exciting to see San Diego come together to passionately preserve our quality of life by protecting our beaches and bays from pollution. We all have a vested interest ensuring that our precious natural resources are healthy and will be enjoyed by generations to come. It is a privilege to be a part this important work.

*What have been your most significant professional and personal accomplishments?*

Learning to speak fluent Spanish and becoming a father.

*What makes you laugh?*

My daughter when she dances to bluegrass music.

*Please tell me a quirky fact about yourself.*

As a baby I ate snails crawling around in my backyard, now my baby daughter does the same thing. I guess it runs in the family.

**Education:** Bachelor of Arts, Political Science, 1999  
Brigham Young University, Laie, Hawaii

## **Successfully Completed Projects:**

City of San Diego Think Blue:  
Mission Bay, Summer  
Campaign:

- >Managed outreach from Memorial Day through Labor Day
- >Coordinated volunteer outreach resources with Coastkeeper and Alpha Project

City of San Diego Think Blue:  
La Jolla Shores  
Community-Based Social  
Marketing Training To  
Businesses:

- >Managed business survey process and oversaw its implementation
- >Conducted onsite Best Management Practices trainings with business owners and staff

1-5 North Coast  
Corridor General Public  
Relations:

- > Regularly updating communications plan with client's PM
- » Preparing FAQ's regarding Noise issues



## **Destree Lazo fiascos**

Managing Associate

What is your role within Collaborative Services?

I have extensive experience in event coordination such as groundbreaking and ribbon cutting ceremonies and direct community outreach. I enjoy all aspects of managing a diverse range of projects and implementing innovative strategies to enhance community involvement during design and construction.

Can you briefly summarize the projects that you are currently involved in?

I am currently working with the County of San Diego's Department of Public Works and with the City of San Diego Water Conservation Program. For the County's Public Works projects, I am managing projects, providing broadcast email updates, supporting celebratory project events and coordinating press and media coverage. I am also involved in the development of the Watershed Sign Program and the Annual Drinking Water Quality Report.

What motivates you and keeps you engaged in your work?

We have a great team that has a lot of heart to help the community in which we live. Our team spirit and individual motivation enables us to be inspired as well as inspire others.

What have been your most significant professional and personal accomplishments?

My most significant professional accomplishment is being part of the San Diego Watershed Sign Program. Running and completing the 2005 Rock & Roll Marathon has been my most significant personal accomplishment.

What makes you laugh?

I love to laugh. You can always count on me to laugh when you find yourself amidst a crowd of people blankly staring at you when they think your best joke is lame.

Please tell me a quirky fact about yourself.

I am an aspiring 300-score bowler and almost became a chemist due to my love of the Periodic Table of Elements.

**Education:** Master of Arts, Communications, 2002  
San Diego State University, San Diego, California  
Bachelor of Arts, Communications, 2000 University  
of California, San Diego, California

### **Successfully Completed Projects:**

City of San Diego Midway  
Pacific Corridor Community Plan  
Amendment:

- >Provided event logistics for 3 public workshops and walking tour
- >Documented stakeholder input
- >Coordinated mandatory noticing and additional publicity

City of Oceanside  
Transit-Oriented Development  
Study:

- >Provided event logistics for 3 public workshops and walking tour
- >Documented stakeholder input
- >Coordinated mandatory noticing and additional publicity

County of San Diego  
Public Works Projects:

- >Managed multiple projects on an as-needed contract for 3 years
  - » Coordinated public officials for special events ceremonies
- >Managed team members



## Kara Palmer

Project Assistant

*What is your role **within** Collaborative Services?*

Bringing in over two years of public relations and grassroots outreach experience on various areas, I support my team as a project assistant to meet our client's outreach needs.

*Can you briefly summarize the projects that you are currently involved in?*

As a new addition to the CityWorks and Collaborative Services team, I literally hit the ground running assisting community outreach and PR efforts for the I-5/Lomas Santa Fe interchange construction project, as well assisting the city of San Diego's "Think Blue" Storm Water Pollution Prevention and street sweeping programs.

*What motivates you and keeps you engaged in your work?*

When I realize that the work I am doing IS relevant to people's lives. I take pride in the fact that I have the ability to contribute and make the community better, at least in my own small way. I also genuinely love working with people, developing relationships, and going above and beyond to exceed expectations.

*What have been your most significant professional and personal accomplishments?*

Studying abroad in Spain for a year was a significant personal accomplishment. Professionally, having worked start to finish on a hard fought state-wide ballot initiative campaign and coming out victorious after months of 10-hour days and work-filled weekends was a huge professional accomplishment.

*What makes you laugh?*

People-watching. People do hilarious things when they think nobody is watching!

*Please tell me a quirky fact about yourself.*

I hate milk in cereal. Nothing bothers me more than soggy cereal.

**Education:** Bachelor of Arts, Political Science and Spanish,  
2006 University of California, Davis, California

### Successfully Completed Projects:

City of San Diego Think Blue:  
Mission Bay, Summer Campaign:

- >Direct outreach to marinas
- >Holiday outreach to boaters

City of San Diego Think Blue:  
La Jolla Shores  
Community-Based Social Marketing Training To

Businesses: ^ Conducted onsite trainings  
>Conducted telephone survey

1-5 General Public Relations:  
>Preparing newsletter for 100,000 stakeholders  
>Preparing website updates  
>Developing content for FAQs regarding Noise



427 "C" Street  
Suite 200 San  
Diego, CA  
92101

. . . . .

## "Failure is impossible."

LAURA WARNER

AIA, President, Warner Architecture + Design / Partner, CityWorks

i "ft;:

***What is your role within Warner Architecture + Design?***

I lead the architecture and the design side of urban planning projects. My role is to always inspire our team to strive for excellence by creating solutions that incorporate our technical and design expertise with the knowledge that our clients and the community bring to our projects.



***Can you briefly summarize the projects that you are currently involved in?***

Currently, I am working on the Specific Plan and design guidelines for the City of El Cajon and SANDAG's early action projects for improving transportation options in San Diego County. I am also working with the Building Industry Association to develop a comprehensive approach towards defining the elements that constitute an optimally functioning urban environment, along with finishing work with the Super Loop Transit Project.

***What motivates you and keeps you engaged in your work?***

I am motivated by the idea of making cities and regions better places for people to carry out their civic and private lives. Creating optimally functioning public spaces that are easily accessible to community members results in the opportunity for quality architecture.

***What have been your most significant professional and personal accomplishments?***

The fact that the firm is known for quality and integrity is my most significant professional accomplishment. My personal achievement is being able to stay excited and interested in the world.

***What makes you laugh?***

I laugh at adversity because life is too short. Of course, I have been lucky enough to do that.

***Please tell me a quirky fact about yourself.***

I was a competitive gymnast and I can tumble for you.

**Education:** Bachelor of Architecture, 1985  
University of California, Berkeley, California

!\* urfe

ioi

^

427 "C" Street  
Suite 200 San  
Diego, CA  
92101



**"A place for everything, everything  
in Its place." -Benjamin Franklin**

**NICK COTTRELL**

Graphic Designer

***What is your role within Warner Architecture + Design?***

With more than five years of experience as a graphic and web designer, my role within the firm includes all elements of print and web design for our clients. I integrate visual language into a variety of printed and interactive components. Most recently, due to the explosion of techno-web projects in the marketplace today, I have been more focused on web development. While designing for the web, my edge has always been being able to apply skills I learned as a print and layout designer. The result has been flexible design frameworks with distinct messages to disseminate on the web.

***Can you briefly summarize the projects that you are currently involved in?***

I am currently working on the graphics for the Transnet 1-5 Corridor System Management Plan and updates to the Transnet Keep San Diego Moving website.

***What motivates you and keeps you engaged in your work?***

I have been fortunate to find myself in a field that allows me to do what I love to do. Warner Architecture + Design allows me to put my skills to use for the greater good by working on projects that improve infrastructure and urban development. It feels great to work on projects that are actually going to make a difference in the community.

***What have been your most significant professional and personal accomplishments?***

For the past five years I have been actively involved with the AIGA San Diego's Y Design Conference. This internationally acclaimed event brings graphic designers together from all over the world and is the only conference of its kind within the AIGA. I am proud both personally and professionally to be a part of its success.

***What makes you laugh?***

*Bill and Ted's Excellent Adventure*

***Please tell me a quirky fact about yourself.***

I used to be completely obsessed with fonts. I used to read books and go to websites that were strictly devoted to fonts, type, and lettering. It's a big part of design so its a normal part of any design education, but I became obsessed with every street sign, printed signage, design piece, book, and anything else that contained any kind of letters or numbers.

**Education:** Bachelor of Arts, Art with an emphasis in Graphic Design, 2004,  
San Diego State University, San Diego, California

427 "C" Street  
Suite 200 San  
Diego, CA  
92101



"Let it be. - the beatles"

JENNIFER WEBB

Assistant Graphic Designer

***What is your role within Warner Architecture + Design?***

As graphic assistant, I bring my creativity and education to the many styles and medias that the firm uses. My work includes designs that are functional for our client's audience. Using attention to detail and solid organizational skills, I am a resource for problem solving and visual solutions that will benefit our client's and the community.

***Can you briefly summarize the projects that you are currently involved in?***

I am currently assisting in the design components of the Transnet Interstate 5 Corridor System Management Plan. Also, I am assisting in the design of the Interstate 15 Middle Segment brochure.

***What motivates you and keeps you engaged in your work?***

It is hard to not be engaged in great design that is so beneficial to the community and environment. It is a rewarding feeling to know you are working for the greater good. I think the atmosphere of the office also makes it very easy to work hard towards a unified goal because we all show such pride for what we do and are equally supportive of one another.

***What have been your most significant professional and personal accomplishments?***

Moving to San Diego from Chicago was personally a big achievement. I also actively participated as a 4 Year AIGA Member assisting with their Seek Conference in Chicago, Illinois. Lastly, spending the summer of 2006 in Italy studying abroad and doing independent design research was a life changing event.

***What makes you laugh?***

My Yorkie CoCo cracks me up. She has the funniest personality that can always get me rolling on the floor.

***Please tell me a quirky fact about yourself.***

I love paper.

**Education:** Bachelor of Arts, Visual Communications, 2007  
Northern Illinois University, DeKalb, Illinois



## **TRANSLATION SOLUTIONS**

13941 Capewood Lane

San Diego, California 92128

Telephone: (858) 613-0936 Fax: (858) 613-0064

E-mail: [info@translationsolutions-us.com](mailto:info@translationsolutions-us.com)

Website: [www.translationsolutions-us.com](http://www.translationsolutions-us.com)

Cheryl Gans is the Senior Project Manager with Translation Solutions and has a B.A. in Organizational Management from the University of Michigan. She has over five years of sales and management experience working in the hospitality industry including conducting customer service employee training for the Marriott Long Wharf Hotel in Boston, MA, and working as a Catering Sales Manager at the Catamaran Resort in San Diego, CA. For the last twelve years, Cheryl has been working as a Project Manager with Translation Solutions, which has allowed her to combine her organizational management background and her strong customer service training with her love for languages. Fluent in Spanish, Cheryl is also actively involved in the Spanish translation review and editing process.

## Section II, Specifications

1 1. The Consultant shall be accessible, at the minimum, by e-mail and telephone, Monday through Friday between the hours of 9:00 a.m. and 5:00 p.m., Pacific Time excluding City holidays.

RESPONSE: Collaborative Services will be shall be accessible, at the minimum, by e-mail and telephone, Monday through Friday between the hours of 9:00 a.m. and 5:00 p.m., Pacific Time excluding City holidays. Currently, the firm's general business hours are Monday through Friday between the hours of 8:30 a.m. and 5:30 p.m.

1 2. Further, the selected Consultant shall provide the City's Project Manager with quarterly reports summarizing and verifying any sub-consultant charges for completing various Community Plan Update tasks; and shall specifically identify consultants' position, role and responsibility for completing each specific task.

RESPONSE: Collaborative Services will provide the City's Project Manager with quarterly reports summarizing and verifying any sub-consultant charges for completing various Community Plan Update tasks; and shall specifically identify consultants' position, role and responsibility for completing each specific task. Work reports are essential tools for tracking progress, identifying roles and responsibilities of each project team member, and sharing information.

1 3. The Consultant shall submit a list, which indicates all prime contracts and/or amendments awarded to the Consultant from the City of San Diego for the last three (3) years. The list shall include a short description of the project, the project scope of work, award date, completion date, name of City's Project Manager, and contract value.

RESPONSE: Collaborative Services has several contracts with the City awarded in the last 3 years, these include:

### Think Blue and Storm Water Pollution Prevention Program Outreach

Description of Project: As support to the City of San Diego's Storm Water Department, Collaborative Services is helping to educate San Diegans about storm water pollution prevention. Typical challenges of these projects include: incorporating the Community-Based Social Marketing approach that satisfies both the scientific model & practical outreach strategies, coordinating volunteer participation, determining outreach methods to different stakeholders, and ensuring storm water policy and regulations are being fulfilled.

Project Scope of Work: Community outreach, stakeholder involvement, Best Management Practices training, and event coordination services for Think Blue Program and storm water pollution prevention projects.

## Section II, Specifications

Award Date:

2007

Completion Date:

Present

Name of City's Project Manager:

Jennifer Nichols-Kearns,  
Senior Public Information Officer

Contract Value:

\$298,770

### Genesee Avenue Widening Project

Description of Project: Collaborative Services is implementing specialized outreach and involvement measures to mitigate the impacts of construction on the stakeholders along Genesee Avenue. The goal of this project is to improve traffic flow and alleviate traffic congestion along Genesee Avenue by widening its existing four lanes to six lanes, from Campus Point Drive to the Interstate 5 overpass bridge. Additional improvements include: improving existing medians and adding new raised medians, sidewalks and bus pads, adding a southbound right-turn lane at Campus Point Drive, and adding a northbound right-turn lane and modifying traffic signals at Scripps Hospital Drive.

Project Scope of Work: Community outreach, stakeholder involvement, facilitation services, and event coordination services for Genesee Avenue Widening Project.

Award Date:

2005

Completion Date:

Present

Name of City's Project Manager:

Frank Gaines, Project Manager

Contract Value:

\$74,550

### Water Conservation Program Education and Outreach

Description of Project: Collaborative Services is supporting the City of San Diego's Water Conservation program by expanding landscape water conservation while maintaining indoor conservation programs.

## Section II, Specifications

Services began with a series of stakeholder workshops to involve jurisdictional leaders and community-based decision makers in the development of a community-based outreach strategy and has now grown to an expansion of community outreach activities, publicity, and events.

Project Scope of Work: Community outreach, stakeholder involvement, and event coordination services for water conservation programs.

Award Date:

2001

Completion Date:

Present

Name of City's Project Manager:

Chris Robbins, Supervising Analyst

Contract Value: \$

1 00,000/year

Safe Routes to School Program for Rosa Parks Elementary

Description of Project: The City of San Diego improved pedestrian safety to and from Rosa Parks Elementary School by constructing pedestrian improvements in the areas surrounding the school. The proposed budget for these project improvements was \$300,000, which was partially provided by the State of California's "Safe Routes to School" grant program. As part of the grant, the City was required to gather feedback from the community regarding the locations and types of improvements they would like to see.

Project Scope of Work: Community outreach, stakeholder involvement, facilitation services, and event coordination services for Safe Routes to School Program at Rosa Parks Elementary School.

Award Date:

2005

Completion Date:

2007

Name of City's Project Manager:

Nazi Mansury, Project Manager

## Section II, Specifications

Contract Value:

\$24,500

1 4. Consultant shall complete and submit a list of any proposed Subcontractors with their technical proposal for evaluation (use form on page 34).

**RESPONSE:** Collaborative Services has 2 subconsultants on their proposed team: Warner Architecture + Design and Translation Solutions. Warner Architecture + Design will provide as-needed graphic design and urban planning expertise and Translation Solutions will provide translation services for written and verbal communication.

15. The Consultant shall be competent in communicating in Spanish written and verbal) and shall have the ability to provide Spanish translation services.

**RESPONSE:** Collaborative Services has been working with Translation Solutions for two years. Translation Solutions is committed to providing highly accurate translations and excellent, responsive customer service. The translation process is a rigorous one which includes translation by a native professional translator who has been certified by the American Translators Association, in addition to editing and proofreading by a second qualified translation professional. Their translators are not only certified in their language combination but also have a minimum of ten years professional translation experience. Additionally, we have several staff members on our team who are bilingual in Spanish and English available to draft and proof project materials.



## Section II, Specifications

### D. REFERENCES

Consultant teams are required to provide a minimum of three (3) references for each team member to demonstrate successful performance for work of similar scope to the City of San Diego as specified in this RFP during the past three (3) years (use form on page 33). Consultant teams must also demonstrate that they are properly equipped to perform the work as specified in this RFP. This will enable the City to judge product reliability, performance, and other information. The City reserves the right to contact references not provided by the Consultant team.

RESPONSE: Collaborative Services has provided our references below as well as in the Consultant's Statement of References form in the Additional Submittals/Forms section of the Technical Volume.

#### Reference 1

Company Name: City of San Diego Planning Department

Contact Name: Kevin Sullivan Address: 202 C Street,

MS 4A San Diego, CA92101 Telephone: (619)

236.7173 Fax: (619)533.5351 Dollar Value of

Contract: \$200,000 Contract Dates: 2000

Requirements of Contract: Community outreach, stakeholder involvement, facilitation, and event coordination services for Midway Pacific Corridor Community Plan.

#### Reference 2

Company Name: County of San Diego Public Works Dept.

Contact Name: Sirous Deylamian

Address: 5555 Overland Ave.

San Diego, CA92123

Telephone: (858) 694.2814

Fax: (858) 694.2499

Dollar Value of Contract: \$250,000 for each of the following years

Contract Dates: 2000, 2005, 2006, 2008

Requirements of Contract: Community outreach, stakeholder involvement, facilitation, event coordination, hotline management, project updates, and press and media coordination services for various County of San Diego Public Works projects.

## Section II, Specifications

### Reference 3

Company Name: El Cajon CDC

Contact Name: Claire Carpenter

Address: 401 East Main Street El

Cajon, CA 92020 Telephone:

(619)401.8858 Fax:

(619)401.8870 Dollar Value of

Contract: \$5,000 Contract Dates:

2006 - present

Requirements of Contract: Board retreat design and facilitation and staff involvement in Now to Wow Vision Process.

### Reference 4

Company Name: City of San Diego Engineering & Capital Projects

Contact Name: Nazi Mansury

Address: 1010 Second Avenue, 1 1th Floor

San Diego, CA 92101 Telephone:

(619) 533.3863 Fax: (619)533.3071 Dollar

Value of Contract: \$25,000 Contract Dates:

June 2005 - October 2007

Requirements of Contract: Community outreach, stakeholder involvement, facilitation, and event coordination services for Safe Routes to School Program at Rosa Parks Elementary.

## Section II, Specifications

### **F. Optional Consulting Services**

- 1) Establish and manage project hotlines
- 2) Provide alternatives to walking tours for those who can not walk, such as prepare video slideshow available on website
- 3) Graphics support on visual displays
- 4) Fact sheet and other collaterals not listed in RFP, frequently asked questions and answers
- 5) Media advertisements or paid public notices

### PROPOSER'S STATEMENT OF REFERENCES

The Proposer is **required** to provide a minimum of three (3) references where work of a similar size and nature was performed within the past three (3) years. This will enable the City of San Diego to judge the responsibility, experience, skill, and business standing of the Proposer.

#### REFERENCES

**Company Name:** city of San Diego Planning Dept. **Contact Name:** Kevin Sullivan

**Address:** 202 c street, us 4a **Phone Number:** (619)236.7173

San Diego, CA 92101 **Fax Number:** (619)533.5351

**Dollar Value of Contract:** 8200.000 **Contract Dates:** 2000

**Requirements of Contract:** Community outreach, stakeholder involvement, facilitation services, and event coordination services for Midway Pacific Corridor Community Plan.

**Company Name:** County of San Diego Department of Public Works **Contact Name:** Si roue Devi ami an

**Address:** 5555 Overland Avenue **Phone Number:** (858)694.2814

San Diego, CA 92123 **Fax Number:** (858)694.2499

**Dollar Value of Contract:** \$250,000 for each of the following years **Contract Dates:** '00, '05, '06, and '08  
**Requirements of Contract:** Community outreach, stakeholder involvement, facilitation

services, event coordination, hotline management, press and media coordination, project updates for various County of San Diego Public Works Projects ^^ ^^

**Company Name:** El Galon CDC **Contact Name:** Claire Carpenter

**Address:** 401 East Main Street **Phone Number:** (619)401.8858

El ca-lon, CA 92020 **Fax Number:** (619)401.8870

**Dollar Value of Contract:** \$ 5,000 **Contract Dates:** 2006 - present

**Requirements of Contract:** Board Retreat, Design Facilitation and Staff Involvement

Now to Wow Vision Process

**PROPOSER'S STATEMENT OF REFERENCES**

The Proposer is **required** to provide a minimum of three (3) references where work of a similar size and nature was performed within the past three (3) years. This will enable the City of San Diego to judge the responsibility, experience, skill, and business standing of the Proposer.

**REFERENCES**

**Company Name:** City of San Diego Engineering & Capital Prelects **Contact Name:** Nazi Mansurv

**Address:** 1010 Second Avenue, nth Floor **Phone Number:** (619)533-3863

San Diego, CA 92101 **Fax Number:** (619)533-3071

**Dollar Value of Contract:** \$25,000 **Contract Dates:** June a00s-oct 200?

**Requirements of Contract:** Community outreach, stakeholder involvement, facilitation services, and event coordination services for Safe Routes Program at Rosa Parks

Elementary School.

**Company Name:** \_\_\_\_\_ **Contact Name:** .

**Address:** \_\_\_\_\_ **Phone Number:**

\_\_\_\_\_ **Fax Number:**

**Dollar Value of Contract:** \$ \_\_\_\_\_ **Contract Dates:**

**Requirements of Contract:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_ **Contact Name:** .

**Address:** \_\_\_\_\_ **Phone Number:**

\_\_\_\_\_ **Fax Number:**

**Dollar Value of Contract:** \$ \_\_\_\_\_ **Contract Dates:**

**Requirements of Contract:** \_\_\_\_\_

**PROPOSER'S STATEMENT OF SUBCONTRACTORS**

The Proposer is **required** to state below all subcontractors to be used in the performance of the proposed contract, and what portion of work will be assigned to each Subcontractor. Failure to provide details of Subcontractors may be grounds for rejection of proposal. NOTE: Add additional pages if necessary.

**Company Name:** Warner Architecture & Design **Contact Name:** Laura Warner

**Address:** 427 c street, Suite 200 **Phone Number:** (619) 238-6009

San Diego, CA 92101 **Fax Number:** (619)238-6042

**Percentage of dollars of the sub compared to total contract value:** Jj %  
Graphic design on website, brochures, newsletters, visual displays,

**Requirements of contract:** and other project collaterals.

**What portion of work will be assigned to this subcontractor:** Same as stated above.

**Company Name:** Translation Solutions **Contact Name:** Cheryl Gans

**Address:** 13941 Capewood Lane **Phone Number:** (858) 613-0936

San Diego, CA 92128 **Fax Number:** (858) 613-0064

**Percentage of dollars of the sub compared to total contract value:** 10 %

**Requirements of contract:** As needed translation services for collateral materials or workshops.

**What portion of work will be assigned to this subcontractor:** Same as stated above.

**Company Name:** \_\_\_\_\_ **Contact Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **Phone Number:** \_\_\_\_\_

\_\_\_\_\_ **Fax Number:** \_\_\_\_\_

**Percentage of dollars of the sub compared to total contract value:**     %

**Requirements of contract:** \_\_\_\_\_

**What portion of work will be assigned to this subcontractor:** \_\_\_\_\_

**Purchasing & Contracting Dept. • City of San Diego**

**CONTRACTOR STANDARDS**  
*Questionnaire*

On May 24, 2005, the Council of the City of San Diego adopted Ordinance No. O-19383. The intent of the Contractor Standards clause of San Diego Municipal Code §22.3224 is to ensure the City of San Diego conducts business with firms that have the necessary quality, fitness and capacity to perform the work set forth in the contract.

To assist the Purchasing Agent in making this determination, each bidder/proposer must complete and submit the attached questionnaire with the bid/proposal. If a non-competitive process is used to procure the contract, the proposed contractor must submit this completed questionnaire prior to execution of the contract. Submitted questionnaires are public records and information contained within will be available for public review for at least ten (10) calendar days, except to the extent that such information is exempt from disclosure pursuant to applicable law.

All questionnaire responses must be typewritten or printed in ink. If an explanation is requested or additional space is required, respondents must use the *Questionnaire Attachment "A "* and sign each page. The signatory of this questionnaire guarantees the truth and accuracy of all responses and statements. Failure to submit this completed questionnaire may make the bid/proposal non-responsive and disqualified from the bidding process. If a change occurs which would modify any response, Contractor must provide the Purchasing Agent an updated response within thirty (30) calendar days.

**A. PROJECT TITLE:**

Professional Public Outreach, Involvement, and Facilitation Services

**B. BIDDER/CONTRACTOR INFORMATION:**  
Collaborative Services

Legal Name	San Diego	DBA	
427 C Street, Suite 200		CA	92101
Street Address	City	State	Zip
Catherine Smith, JD,	(619) 232-2112	(619) 232-2012	
Contact Person, Title	Phone	Fax	

**C. OWNERSHIP AND NAME CHANGES:**

- In the past five (5) years, has your firm changed its name?  
**D** Yes                      **[x]** No

If Yes, use *Questionnaire Attachment "A "* to list all prior legal and DBA names, addresses and dates when used. Explain the specific reasons for each name change.

- In the past five (5) years, has a firm owner, partner or officer operated a similar business?  
Q Yes                      **[x]** No

If Yes, use *Questionnaire Attachment "A "* to list names and addresses of all businesses and the person who operated the business. Include information about a similar business only if an owner, partner or officer of your firm holds or has held a similar position in another firm.

**D. BUSINESS ORGANIZATION/STRUCTURE:** Indicate the organizational structure of your firm. Check one only on this page. Use *Questionnaire Attachment "A "* if more space is required.

**n Corporation** Date incorporated: \_\_/\_\_/\_\_\_\_ State of incorporation: \_

List corporation's current officers:

President: \_ \_ \_ \_ \_  
Vice President: \_\_\_\_\_  
Secretary: \_ \_ \_ \_ \_  
Treasurer: \_ \_ \_ \_ \_

Is your firm a publicly traded corporation?  Yes  No

If Yes, name those who own five percent (5%) or more of the corporation's stocks:

**Limited Liability Company** Date formed: \_\_/\_\_/\_\_ State of formation:

List names of members who own five percent (5%) or more of the company:

**Partnership** Date formed: / / State of

formation: List names of all firm partners:

**Sole Proprietorship** Date started: 07 / 05 / 1995

List all firms you have been an owner, partner or officer with during the past five (5) years. Do not include ownership of stock in a publicly traded company:

CityWorks, a joint venture of Collaborative Services and  
Warner Architecture + Design

**Joint Venture** Date formed: \_ / \_ /

List each firm in the joint venture and its percentage of ownership:

Note: Each member of a Joint Venture must complete a separate *Contractor Standards Questionnaire* for a Joint Venture's submission to be considered responsive



**E. FINANCIAL RESOURCES AND RESPONSIBILITY:**

1. Is your firm in preparation for, in the process of, or in negotiations toward being sold?  
es E No

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances, including name of the buyer and principal contact information.

2. In the past five (5) years, has your firm been denied bonding?  
U Yes HJNo

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances; include bonding company name.

3. In the past five (5) years, has a bonding company made any payments to satisfy claims made against a bond issued on your firm's behalf or a firm where you were the principal?  
D Yes E1No

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances.

**F. PERFORMANCE HISTORY:**

1. In the past five (5) years, has your firm been found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for defaulting or breaching a contract with a government agency?  
D Yes QDNo

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances.

2. In the past five (5) years, has a government agency terminated your firm's contract prior to completion?  
D Yes [J No

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances and provide principal contact information.

**G. COMPLIANCE:**

1. In the past five (5) years, has your firm or any firm owner, partner, officer, executives or management been criminally penalized or found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for violating any federal, state or local law in performance of a contract, including but not limited to laws regarding health and safety, labor and employment, wage and hours, and licensing laws which affect employees?  
D Yes QDNo

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances surrounding each instance; include name of entity involved, specific infractions) or violation(s), dates of instances, and outcome with current status.

2. In the past five (5) years, has your firm been debarred or determined to be non-responsible by a government agency?  
U Yes H No

If Yes, use *Questionnaire Attachment "A "* to explain specific circumstances of each instance; include name of entity involved, specific infraction, dates, and outcome.



**Purchasing & Contracting Dept \* City of San Diego**  
**CONTRACTORS STANDARDS**  
*Ouestionnaire. A ttar.hme.nt "A "*

Provide additional information in space below. Use additional *Questionnaire Attachment "A"* pages as needed; sign each page. Print in ink or type responses and indicate question being answered. Information provided will be available for public review, except from disclosure pursuant to applicable law.

introduction to Collaborative Services:

The mission of Collaborative Services is to bring together the people needed to improve our communities. As such, Collaborative Services works statewide to design, facilitate and manage community involvement and relations services about natural resource management, economic development, infrastructure planning, transit-oriented development and cultural diversity. For our unique, high-quality services, we have received the following awards:

Ahwanhee Award of Merit Local Government Commission,  
American Planning Association, American Institute of Architects

Award of Merit California Association of Local  
Economic Development

Public Project of the Year  
City of San Diego

Public Project of the Year, Public Involvement  
Association of General Contractors

Collaborative Services is also a joint-venture partner to CityWorks, an urban planning firm that fully integrates urban planning with stakeholder involvement. CityWorks' recent projects include: The C Street Walking Tour in Downtown San Diego, National City Harbor District Master Plan, City of Oceanside Transit-Oriented Development Study, and E Street Transit-Oriented Development in Chula Vista. For each of these projects, Collaborative Services was responsible for interjurisdictional coordination and community involvement services.

Our Services:

Collaborative Services is a public involvement firm. Public involvement focuses on helping public agencies involve the community that it needs to implement their policies. Public involvement helps meet the community's expectation of being involved in public decisions and helps create relationships between the agency and its constituents that need to be in place for government decisions to be effective.

Public involvement is a strong complement to traditional public relations techniques, which tend to focus on informing various "publics" about a product or service. Public involvement techniques help to expand information out to the public to address a multitude of informational and involvement needs community members have when they discuss environmental issues, as well as the changes they might need to consider to their own behavior or business practices. Thus, Collaborative Services focuses on: 1) creating public involvement programs that provide the opportunity for community input; 2) creating information (collateral materials) and providing specialized involvement opportunities based on the community's requests and are feasible within the agency's parameters; and 3) continuing this process of information exchange, so that the agency can demonstrate that they are listening to its constituents by providing requested information.

Because we seek to involve the public, we understand how people organize, how their representative groups distinguish themselves from one another, their preferences for receiving information, and their differences in decision making styles. For example, Business Improvement Districts and community planning groups often have different goals regarding transit, parking and density. Community planning groups are traditionally the recognized advisory planning body for cities, however, BIDs have become more influential. Additionally, the Boards of these froups operate differently, are structured around different committees and make decisions differently. Collaborative Services knows how to credibly and effectively engage both kinds of groups in ways that respect their authority, interests and decision making styles. In terms of building community consensus, anticipating these differences at the earliest stages possible of involvement planning develops the likelihood for increasing understanding among these groups, as well as creating new partnerships and agreements.

Collaborative Services also knows how to work with traditionally under-represented groups to help agencies include members of the community who have historically lacked the opportunity or understanding of how to participate in decisions that will impact them. Collaborative Services involves traditionally under-served populations by working with non-profit, community-based organizations, schools, faith-based organizations and translators. By partnering with these sources of information, we are able to provide information that these under-served stakeholders can

