

Work Item (as listed in Specifications of RFP)	Implementation Steps	CS Principal hours GTS	CS PM Hours KCS	CS Managing Assoc 1 Hours DLB	CS Managing Assoc 1 Hours AM	CS Assoc Hours KP	CS Assoc Hours LoG	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal	
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.	Ms. Smith will be the designated Principal in Charge for this project with Mr. Strong as the lead Managing Associate who will support her and be day to day contact for the City and Project Manager. The rest of the Collaborative Services team can also be accessible to provide additional support on various work items. NOTE: Hours for this item are shown in item b.	NOTE: Hours for this item are shown in item b.									
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.	Ms. Smith will oversee all staff work and provide quality control on all work product deliverables. Mr. Strong will be the day to day point of contact for the City Project Manager for 24 months. NOTE: This item were decreased on 1/6/09 to reflect decreased services associated with the City letter dated 12/23/08.	24	60	0	0	0	0	0	0		
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, make decisions and discuss issues that have the potential of adversely affecting the project budget, schedule, or product. 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.	Review existing neighborhood community plans and City of San Diego General Plan. Attend kick-off meeting with project team. Review project status and budget with City. Establish process for obtaining information; editing, review & approvals; and documentation of client or community correspondence. Review roles and responsibilities. Draft and provide monthly revisions to project schedule for public outreach and involvement. Develop communications plan. Develop press & media plan. Draft and prepare meeting agendas for 24 months. Draft and prepare meeting minutes for 24 months. NOTE: Hours in this item were decreased and reassigned to reflect decreased services associated with the City letter dated 12/23/08.	24	100	6	6	6	0	48	0		
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.	Develop, maintain, and provide monthly progress memos for 24 months. Contact and communicate with City Project Manager regularly (at least bi-weekly) to provide updates on the progress of work, schedule, budget or decisions. Maintain documentation for decisions being made and secured approvals. NOTE: Hours in this item were decreased and reassigned to reflect decreased services associated with the City letter dated 12/23/08.	NOTE: Hours for this item are shown in items b and c.									
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. NOTE: The quality assurance item in this section has been included in items b and c above. Also, the collaboration on plan development has been deleted.	Collaborative Services will review documents for spelling, grammar, and accuracy. In addition, Collaborative Services will also review and collaborate on these sections mentioned in Appendix A, but not listed in Specifications: Community Plan Update Elements, Three Alternative Land Use Concept Plans, Economic and Fiscal Analysis into Land Use Scenarios, Urban Form Analysis and Massing Studies, Visual Preference Survey, Public Facilities & Park System Strategy including Phasing and Financing Plan, Mobility Analysis and Traffic Study, Rezoning Program and Workshop, Public Financing Plan, and publication of materials and documents. NOTE: The fee for quality assurance is included in item b above. The hours here are for reviewing and collaborating on the plan development.	NOTE: Hours for this item are shown in items b and c.									
		total hours	48	160	6	6	6	0	48	0	
		hourly rate	190	125	115	115	85	85	70	55	
		subtotal	9120	20000	690	690	510	0	3360	0	34370

Work Item (as listed in Specifications of RFP)	Implementation Steps	CS Principal hours CTS	CS PM Hours KCS	CS Managing Assoc 1 Hours DLB	CS Managing Assoc 1 Hours AM	CS Assoc Hours KP	CS Assoc Hours LoD	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal
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.	Collaborative Services will provide various strategies for client consideration for community outreach and involvement. Additionally, Collaborative Services will prepare and create project materials, such as an involvement and communications plan, talking points and frequently asked questions & answers, for the project team members to use as reference when dealing with community or media questions. NOTE: Hours in this item were decreased and reassigned to reflect decreased services associated with the City letter dated 12/23/08.	15	40	0	0	20	0	20	0	
	total hours	15	40	0	0	20	0	20	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	2850	5000	0	0	1700	0	1400	0	10950
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.	Identify and compile a database of public participants and stakeholders for each of the three communities. [NOTE: This will be part of distributing the e-newsletter described later in this scope.] Identify ways to conduct effective outreach for workshop participation. Identify land use issues and values through existing documents, advisory groups, and public workshops. NOTE: Hours in this item were decreased and reassigned to reflect decreased services associated with the City letter dated 12/23/08.	40	40	0	0	0	0	80	0	
	total hours	40	40	0	0	0	85	80	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	7600	5000	0	0	0	0	5600	0	18200
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.	Develop the structure of workshops and charrette for each of the three communities. Select with the team the most effective way to gather input from community meetings. Provide documentation for input gathering. Synthesize input by exact transcription of by categorizing info by topic or priority. Present summary of input to the team. NOTE: Please refer to item e 1-6 in this section for staff hours.	NOTE: Please refer to item e 1-6 in this section for staff hours.								
	total hours	0	0	0	0	0			0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	0	0	0	0	0	0	0	0	0
d. The selected Consultant shall work to build consensus among public participants and stakeholders regarding new plan goals, objectives, recommendations, and plan alternatives.	Educate and explain the process for the community plan update to the stakeholders and public. Give the public an opportunity to provide input. Involve participants in suggesting ideas. Facilitate discussions to solicit public input. Help the workshop participants and stakeholders prioritize ideas. Continue to inform advisory groups, stakeholders, participants, and the community the progress of the project. Demonstrate how community input was integrated in the final document. NOTE: Please refer to item e 1-6 in this section for staff hours.	NOTE: Please refer to item e 1-6 in this section for staff hours.								
	total hours	0	0	0	0	0	0	0	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	0	0	0	0	0	0	0	0	0

Work Item (as listed in Specifications of REP)	Implementation Steps	CS Principal hours CTS	CS PM Hours KCS	CS Managing Assoc I Hours DIB	CS Managing Assoc I Hours AM	CS Assoc Hours KP	CS Assoc Hours LoG	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal
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:	Develop and refine outreach strategy to review with project team. Prepare and adjust schedule to implement various phases and tasks for community update by coordinating with team members. NOTE: Please refer to item a. in this section and Item c in Project Administration for staff hours.	NOTE: Please refer to item a. in this section and item c in Project Administration for staff hour								
	total hours	0	0	0	0	0	0	0	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	0	0	0	0	0	0	0	0	0
e1} Monthly Stakeholder Advisory Group and Cluster Update Advisory NOTE 1: Revised e1 per City Letter dated 12/23/08: Up to 9 Stakeholder Advisory Group Meetings through the 24 month process and 3 Cluster Advisory Group Meetings. Assumes 2 hours for each meeting plus 1 hour onsite for meeting preparation and wrap up for Advisory Group Meetings and assumes 2 hours for each Cluster Update Committee meeting plus 1 hour onsite for meeting preparation and wrap up. Additional time to design these meetings and provide event logistics and document has been added to the hourly assumptions shown above and provided in the City's letter. NOTE 2: The walking audit previously scoped in a separate line item e5 below can be provided here as one of the meetings that these groups hold for themselves at the beginning of their process. This would give them a shared experience of the area that could focus on the elements that make a community successful and would improve the quality of the input. Budget for designing the walking tour of each of the three communities and a walking tour map/route is provided here. These can	Explain the process for the community plan update. Schedule dates for meetings with the group. Draft a timeline. Draft 9 agendas for Stakeholder Advisory Group Meeting and 3 for Cluster Advisory Group. Draft and develop working binder for groups to keep meeting materials. Develop goal for each meeting. Discuss roles for community workshops. Attend, facilitate and document each meeting. NOTE: Assumes urban planning team is providing the presentation materials.	80	140	0	0	40	0	80	0	
	total hours	80	140	0	0	40	0	80	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	15200	17500	0	0	3400	0	5600	0	41700
e2} Public Workshops--minimum of six for each community planning area NOTE 1: Revised e2 per City Letter dated 12/23/08: Public Workshops 1 for each community planning area. Assumes 3 hours for each workshop plus 1 hour onsite for meeting preparation and wrap-up plus sufficient time to design workshop and event logistics (i.e. secure site in advance, trouble shoot site issues, conduct walk through with team, etc.) and document these workshops. NOTE 2: The walking audit previously scoped in a separate line item can be provided here as one of the 1st community workshop before people give input about their vision for the community. This would give them a shared experience of the area that could focus on the elements that make a community successful and would improve the quality of the input. The walking tour map created for the Advisory Group Meeting can also be used for the 1st public workshop.	Draft a timeline of community involvement events. Determine goals for each workshop. Develop event design and layout. Discuss and select with project team the best design and layout. Coordinate project team responsibilities. Coordinate event logistics. Coordinate event notifications. Draft event materials (i.e. invitation, media-ed or press release, agenda, project boards, fact-sheets, etc.) Translate event materials to Spanish. Facilitate event. Photo document event. Gather or document public input. Summarize input.	15	36	0	0	30	0	60	0	
	total hours	15	36	0	0	30	0	60	0	
	hourly rate	190	125	115	115	85	85	70	55	
	subtotal	2850	4500	0	0	2550	0	4200	0	14100

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e3) One (1) charrette process (up to six days in length) for each community planning area NOTE: Revised e3 per City letter dated 12/23/08: One (1), 3-day charrette for each community planning area. Assumes 12 hours of meeting for each community conducted in a workshop format, 2 hours for meeting preparation and wrap up for each charrette over a 3 day period plus sufficient time to design charrette and event logistics (i.e. secure site in advance, trouble shoot site issues, conduct walk through with team etc) and document these charrettes. NOTE 2: The walking audit previously scoped in a separate line item can be provided here as one of the 1st day of the charrette before people give input about their vision for the community or on plans that are being developed to illustrate that vision. This would give them a shared experience of the area that could focus on the elements that make a community successful and would improve the quality of the input. If this option is used, then the workshop would be held to the end as the formal presentation to the public of the plans developed through the walking tour	Draft a timeline of community involvement events. Determine goals for charrette. Develop event design and layout. Discuss and select with project team the best design and layout. Coordinate project team responsibilities. Coordinate event logistics. Coordinate event notifications. Draft event materials (i.e., invitation, media ad or press release, agenda, project boards, fact sheets, etc.) Facilitate event. Photo document event. Gather or document public input. Summarize input. NOTE: Assumes three charrettes, one for each community that are 2 hours a day for six days.	48	80	0	48	60	0	80	0		
		total hours	48	80	0	48	60	0	80	0	
		hourly rate	190	125	115	115	85	85	70	55	
		subtotal	9120	10000	0	5520	5100	0	5600	0	35340
e4) Focus/working group meetings as needed. [NOTE: as needed added to the task description per the City letter dated 12/23/08. As such the hours for this service have been removed until which time the City directs the services and budget get can be scoped for the services directed at that time.] (not specified in RFP, but will assume 3 meetings, 1 per community)	Draft a timeline for community involvement events; Determine goals for meeting; Develop event design and layout; Discuss and select with project team the best design and layout; Coordinate project team responsibilities; Coordinate event logistics; Coordinate event notifications; Draft event materials (i.e., invitation, media ad or press release, agenda, project boards, fact sheets, etc.) Facilitate meeting; Photo document event; Gather or document public input;	0	0	0	0	0	0	0	0		
		total hours	0	0	0	0	0	0	0	0	
		hourly rate	190	125	105	105	85	85	70	55	
		subtotal	0	0	0	0	0	0	0	0	0

Work Item (as listed in Specifications of RFP)	Implementation Steps	CS Principal hours CTS	CS PM Hours KCS	CS Managing Assoc I Hours DLB	CS Managing Assoc I Hours AM	CS Assoc Hours KP	CS Assoc Hours LoG	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal
e5) Walk audits - (NOTE: This item has been removed as a separate item. It can be accomplished in one of three ways: either as one of the nine Advisory Group Meetings or one of three Cluster Meetings, through the 1st public workshop, or as the first day of the charette process. The hours that were originally scoped for this line item have been removed from this revised scope. Currently, a walking tour is included in the scope for the Advisory Group and for the 1 workshop planned for each community, as it would benefit everyone to take these tours. Conversely, if the 1st day of the charette is the walking tour and the workshop is held after the charette to show final plans, then the walking tour budget can be moved accordingly. These options would need to be reviewed with the selected urban planning team in order to finalize the approach. (not specified in RFP, but this item assumes 3 audits, 1 for each community)	Draft a timeline community involvement events. Determine if walk audit is a separate event or combined with a workshop. Determine goals for meeting. Develop event design and layout. Determine walking route. Create walking audit map and checklist. Provide an alternative way to do audit for those who can not walk. Discuss and select with project team the best design and layout. Coordinate project team responsibilities. Coordinate event logistics. Coordinate event notifications. Draft event materials (i.e., invitation, media ad or press release, agenda, project boards, fact sheets, etc.) Translate event materials to Spanish. Facilitate meeting. Photo document event. Gather or document public input.	0	0	0	0	0	0	0	0	
		total hours	0	0	0	0	0	0	0	
		hourly rate	190	125	115	115	85	85	70	55
		subtotal	0	0	0	0	0	0	0	0
e6) Community surveys (not specified in RFP, but will assume 1 universal survey format) Note: This item modified to reduce its scope. Current assumption is that the survey would be designed by the consultant team and provided to the City to upload to its website. Assumes that City's PM would receive and compile survey results from the City's web team. Consultant team recommends that the City add in to the scope one to one telephonic surveys with key stakeholders or with the Advisory Group Members, however that item is currently unscoped but can be added in at the City's direction.	Determine goal of surveys Draft survey. Translate survey. Review survey with project team and advisory committees. Revise and secure approval. Identify uses for survey (hard and online version) Coordinate with City's web team to upload survey Distribute survey. Compile results from survey.	4	8	0	0	8	8	0	0	
		total hours	4	8	0	0	16	8	0	0
		hourly rate	190	125	115	115	85	85	70	55
		subtotal	760	1,000	0	0	1,360	680	0	3,800
e7) Presentations/updates to public officials (not specified in RFP, but this item assumes 2 presentations: 1 for to report on progress and 1 for final draft) NOTE: This item deleted per the City letter dated 12/23/08.	Gather information to construct presentation from project team. Determine goal of presentation. Develop structure of presentation (where we've been, where we are, where we are going) Draft presentation materials (handout, powerpoint, collateral project materials). Translate materials to Spanish. Revise presentation materials based on project team edits. Be available to present with team on progress of project.	0	0	0	0	0	0	0	0	
		total hours	0	0	0	0	0	0	0	
		hourly rate	190	125	115	115	85	85	70	55
		subtotal	0	0	0	0	0	0	0	0

Work Item (as listed in Specifications of RFP)	Implementation Steps	CS Principal hours GIS	CS PM Hours KCS	CS Managing Assoc 1 Hours DIB	CS Managing Assoc 1 Hours AM	CS Assoc Hours KP	CS Assoc Hours LoG	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal
<p>The Consultant shall provide input to City staff on the following:</p> <p>1) Project website</p> <p><i>(not specified in RFP, but will assume monthly update to website)</i> NOTE: This item modified to reduce scope as follows. Instead of monthly updates, the scope now assumes that the consultant will coordinate with the City's web team to update the Project website four times: 1) prior to 1st workshop, 2) prior to the charrettes, 3) after charrettes when the key elements of the plan have been designed, illustrated and are being written in draft form for policy documents, and 4) before public hearings to present the draft policy documents to decision makers. Only text is now scoped. It is assumed that all graphics will be provided with the urban planning team or by the City's Print Shop.</p>	<p>Make recommendations on the information for the website. Draft text and graphics for website. Coordinate with the web team.</p>	4	8	0	0	0	0	12	0	
<p>2) Project information brochure</p> <p>NOTE: To reduce cost, this item has been modified to assume that the City's Print Shop will provide the graphic design for 3 brochures - 1 for each community. The consultant team would provide text copy for the Print Shop to incorporate into the brochures.</p>	<p>Gather information to construct brochure from project team. Determine goal of brochure. Identify uses for brochures. Prepare matrix of stories: graphics and copy needs to provide to Print Shop. Provide copy to client, receive edits, revise and provide copy to Print Shop. Develop layout of brochure (project description, process, community participation opportunities, and project contact) Draft brochure. Revise brochure based on project team edits. Review Print Shop's 1st version of brochure that has graphics and copy and provide edits. Print Shop secures final approvals from City's PM. Finalize and secure approval for production. Translate brochure to Spanish. Coordinate with production vendors. Distribute brochures. Post brochure online. NOTE: Assumes 1 brochure for each community</p>	18	24	0	0	48	0	0	0	
<p>3) Regular project newsletters</p> <p><i>(not specified in RFP, but this scope assume 3 newsletters for each community: 1 to introduce project and involvement opportunities, 1 to report progress and remaining involvement opportunities, 1 to report on success for each community.)</i> NOTE: This item has been modified to reduce the scope so that newsletters are broadcast emails to stakeholders who have been identified in item shown above and also sent to local media publications in these neighborhoods. This item assumes the e-newsletter is 1 letter page, 2 sided, in color. To emphasize the shared issues these communities have, this newsletter has been changed from 1 newsletter for each of the three communities to 1 newsletter for all the communities. It would be distributed approximately 3 times each year for a total of six newsletters.</p>	<p>Gather information to design and draft newsletter from project team. Determine goal of newsletter. Determine frequency of newsletter. Identify uses for newsletter. Develop layout of newsletter (project description, process, community participation opportunities, progress and project contact) Draft newsletter. Revise newsletter based on project team edits. Finalize and secure approval for production. Translate newsletter to Spanish. Coordinate with production vendors. Distribute newsletters. Post newsletter online.</p>	40	60	0	0	100	100	0	0	

Work Item (as listed in Specifications of RFP)	Implementation Steps	CS Principal hours CT5	CS PM Hours KCS	CS Managing Assoc Hours DLB	CS Managing Assoc Hours AM	CS Assoc Hours KP	CS Assoc Hours LoG	CS Proj Asst Hours JW	CS Admin Asst CV	subtotal
4) Visual displays This item assumes 5 visual displays for 3 communities for 3 workshops—45 presentation boards— NOTE: This item has been modified to delete all hours associated with creating displays. It is assumed that the urban planning team will create its own displays to present its work.	Gather information to construct visual displays from project team. Determine goal of displays Identify uses for displays. Develop layout of displays. Draft displays or determine which project team consultant is better suited to draft display. Revise display based on project team edits. Finalize and secure approval for production. Translate display to Spanish. Coordinate with production vendors. Post displays online.	0	0	0	0	0	0	0	0	
5) Media participation through interviews, public service announcements, etc. NOTE: This item has been modified to specify the following: one press release prior to the 1st workshop, one press release prior to the charrette, one press release prior to public hearings. Additional press releases can be provided as needed at the City's direction with additional budget. Additionally, media coordination to schedule interviews and to coordinate advertisement announcements has been removed. These can be provided as needed at the City's direction with additional budget.	Develop press and media opportunity calendar. Draft press releases. Review, finalize, and secure approval on press release with project team. Pitch project progress to local press & media. Schedule interviews with project spokesperson. Communicate with the press & media regularly to provide them with project info and workshop details. Coordinate with ad sections when appropriate.	3	12	0	0	36	0	0	0	
		total hours	65	104	0	0	184	100	12	0
		hourly rate	190	125	115	115	85	85	70	55
		subtotal	12850	13000	0	0	15640	8500	840	0
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.	Explain the process for the community plan update. Schedule dates for meetings with the group. Draft a timeline. Draft agendas. Draft and develop working binder for group to keep meeting materials. Develop goal for each meeting. Conduct and facilitate meetings. Discuss roles for upcoming community workshops. Note: Please Refer to Work Item e1 in Community Outreach, Meeting Facilitation, and Public Participation									
		total hours	0	0	0	0	0	0	0	0
		hourly rate	190	125	115	115	85	85	65	55
		subtotal	0	0	0	0	0	0	0	0
Totals:	Project Administration Subtotal									34370
	Community Outreach, Meeting Facilitation, and Public Participation									174420
	Grand Total									208790

Assumption: All reimbursable and "Other Direct Costs" such as printing and postage are not included in the hours and fees shown in this scope, as they were not requested in the RFP.
Assumption: All services and their hours and fees are subject to change through negotiations, as variables become defined.