Proposal for Multi-family Objective Design + Development Standards

June 6, 2019
We are urban designers and architects who believe in the transformative power of beautiful, sustainable, walkable communities for all.

In 2007, Opticos became a founding B Corporation, establishing triple bottom line of social, economic, and environmental responsibility.
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June 06, 2019

Ms. Jillian Zeiger  
Marin County Community Development Agency  
3501 Civic Center Drive  
San Rafael, CA 94903  

Dear Jillian and the Selection Committee,

Opticos Design, Inc. is pleased to submit the following proposal to provide Multifamily Objective Design and Development Standards for the County of Marin and 10 partnering jurisdictions. We understand that this request seeks to assist with Marin communities’ need to update the ways in which multifamily and mixed-use development is regulated, reviewed, and entitled in response to current and future housing legislation. As the State continues to prioritize local housing production goals, objective design standards can provide streamlined and predictable review processes, and ensure that new infill development reflects the physical desired character of existing communities.

It is so exciting to see the County and local jurisdictions lead the way in this effort that can ultimately be a model for other Bay Area Counties to follow! We feel that we are uniquely qualified to do this work with you. Here’s why:

Leaders in Place-Based, Innovative Zoning: Our extensive zoning expertise includes over 60 adopted, in-progress, and peer-reviewed zoning codes and Form-Based Codes across the country, including jurisdiction-wide development codes in Livermore, California, Flagstaff, Arizona, and Austin, Texas. Our work has received local and national recognition from the Form-Based Codes Institute (FBCI), the Congress for New Urbanism, and APA and is well-known for its innovation and application of best-practice standards. In particular our work in small-town and rural environments – including Kaua’i County, Hawaii and Beaufort County, South Carolina (one of the first multijurisdictional codes in the country) has focused on “right-sizing” zoning standards in growing places with sensitive, local character and context. This work also extends locally – and increasingly in areas subject to “by-right” approvals under State Law – to places such as Benicia, Novato, Petaluma, Richmond, and San Carlos.

Our Design Approach: Our passion is creating vibrant, healthy, sustainable, and well-designed places, and our design work—an aspect that differentiates us from other firms—reinforces our urban design and place-based approach to planning and zoning. This permeates all of the work we do, down to the ways we make our plans and codes readable and highly effective. In Marin, the place types and building types will need to be prepared and presented in such a way that they can effectively facilitate public discussion about their content, and the objective design standards clear and easy to use and administer.

The Beaufort County Community Development Code is a bold but logical step forward for a County that has historically placed great emphasis on innovative land use planning and natural resource protection.”

Rob Merchant  
Long Range Planner,  
Beaufort County
Opticos was hired specifically because of their expertise in community engagement and form-based code to draft a Specific Plan for the Vallco area. Their comprehensive and thoughtful strategy and ability to communicate alternatives through design and visualization were invaluable to winning support. It was an unprecedented process, and it was a real pleasure to work with the Opticos team.

Aarti Shrivastava
Assistant City Manager/Director of Community Development, City of Cupertino, CA

Designing in Public: We strive to integrate meaningful public participation into every urban design and coding project. Our experience with public outreach ranges from interviews and traditional public meetings to one-day workshops and multiday charrettes.

We anticipate that this project will require a public conversation about zoning standards that may be very personal and controversial for many stakeholders, and design concepts and alternatives will need to be clearly and objectively presented. The project will require openness and transparency and a willingness to listen to differing opinions and find strategies for consensus where possible. To this end, our team members carry National Charrette Institute certification, hold extensive experience "designing in public" (facilitating public meetings and charrettes) across the country, and have approachable, pragmatic personalities—all of which we would utilize to tailor an outreach strategy to the project's unique needs.

Our Multidisciplinary Team: We've joined with our long-time collaborators Lisa Wise Consulting (LWC) and Plan to Place for this project. LWC has been our partner on many coding projects, and the firm brings extensive experience with natural resources, agriculture, land economics, housing, and procedures and working in Marin County. Due to our breadth of experience working together, we are able to present our work seamlessly, providing best-practice knowledge and local knowledge in support of the countywide outreach effort.

Our proposal is valid for 30 days, and we acknowledge receipt of the RFP Questions and Responses published on 29 May 2019.

We are excited for this opportunity to do this work with you!

Sincerely,

Stefan Pellegrini, AICP, LEED AP, NCARB
Principal
stefan.pellegrini@opticosdesign.com
510.558.6957
Firm Description

Proposal for Multi-family Objective Design + Development Standards
Opticos is a team of urban designers, architects, and strategists that partners with clients who want to lead the way in providing vibrant, diverse, walkable urban places. Because we approach each project with innovation and creative problem solving in mind, we function just as much as a think tank as a consulting firm.

To us, architecture and planning must play a role in defining more sustainable, equitable, healthy, compact patterns of development that improve the quality of life for everyone. This starts with revitalizing existing urban places, but also must include the transformation of suburban places into more urban ones and the creation of thoughtful, new walkable urban communities.

As a group of like-minded designers looking to make an impact in the world, we strive to integrate social, environmental, and economic responsibility into all that we do. Professionally, we’re one of the first B Corporations and a founding California Benefit Corporation, a revolutionary new kind of business dedicated to a triple bottom line. Outside of work, we shop locally, live small, and go car-free whenever possible. The only parking issue we experience in our office is a shortage of bike racks!
Our award-winning work at the architecture, neighborhood, and city-wide scales follows the principles inherent in the Charter of the New Urbanism. This work includes a Gold Nugget-winning and LEED-ND Phase 1-Certified Hercules Waterfront District, CNU Charter Award-winning Seaside Beachfront and Town Square Plan, and L’Enfant Award-winning master planning work in Gabon, Africa.

“Our design solutions emphasize the creation of vibrant, sustainable communities, comfortable pedestrian environments, and memorable places that will withstand the test of time.”

Daniel Parolek
Principal, Opticos Design
International Leaders in Zoning Reform and Form-Based Coding

Diverse Scales of FBCs by Opticos

We are leading the zoning paradigm shift with our FBC applications.

Form-Based Coding is a revolutionary approach to zoning that has the power to inspire walkable neighborhoods, resilient communities, and thriving cities. Opticos Design architects and urban designers have been leading the advancement of techniques and best practices. In 2004, Principals Dan and Karen Parolek were part of a team that co-founded the Form-Based Code Institute, a think tank that is now part of Smart Growth America. In 2008, they wrote the definitive book on the topic, Form-Based Codes: A Guide for Planners, Urban Designers, Municipalities, and Developers.

Tony Perez, Opticos’ Director of Form-Based Coding with 30 years of planning experience (12 years as a public sector planner and 18 years as a consulting professional writing Form-Based Codes and form-based general plans) is a national expert in form-based planning and coding having authored 25 codes and coauthored or peer-reviewed 20 other codes. Tony has taught form-based planning at UCLA and currently teaches at Cal Poly Pomona. He has also delivered webinars on the topic through Planetizen.

Accomplishments and Awards

1999 Tony Perez writes his first FBC

2000: Opticos proposed first FBC in Santa Barbara County, CA

2000: Opticos hired as extension of city staff to administer California’s first FBC: The Central Hercules District

2002: Pleasant Hill BART Form-Based Code pro-forma Design Review

2004: Karen and Daniel Parolek are Founding Board Members of the Form-Based Codes Institute

2005

2007: Opticos wins the National Planning Excellence Award for the Grand Hillside community plan.

2008: Driehaus Form-Based Code Award for the Downtown Benicia Mixed-Use Master Plan & FBC

2008: Planetizen names Form-Based Codes in the Top 10 planning books of 2008

2008: Released Form-Based Codes, the first comprehensive book on the subject
An overview of the transect zones is provided on the back of this page.

Urban Transect is a means for considering and organizing the human habitat in a

The transect zones are based on the Rural-to-Urban Transect. The Rural-to-

adhere to the standards of this code.

a desired building form. All development within the mapped transect zones must

be sufficiently diverse or

neighborhood services and

There may be some

boundaries, and pedestrians are

vacancies, does not have visible

throughout the district but

properties are set farther back

The NBD may be too large

• There is no defined community

• There may be some

centers classified as areas to

is to target major opportunities

Transform neighborhood centers

WALKABLE FRAMEWORK

PRIORITY LOCATE

-› -› -›

FBC Award

Citywide Code wins Driehaus

We do not write

Form-Based Codes

because they are

the latest zoning fad, but rather because our experience shows that use-

based zoning is an ineffective way to regulate walkable urban places.”

Tony Perez

Director of Form-Based Coding, Opticos Design

Key Innovations by Opticos

• Established a user-friendly graphic format
• Created a place type-based bridge
• Developed codes tailored to deliver housing choices and Missing Middle Housing
• Created a model for hybrid citywide development codes
• Created first multi-jurisdictional Form-Based Code

Angondje New Town Plan and SmartCode, Gabon, Africa

Citywide FBC and Comp Plan Bridge, Cincinnati, OH

Citywide Land Development Code Update (CodeNEXT), Austin, TX (In Progress)

Multi-jurisdictional Land Development Code and FBC, Port Royal, Beaufort County, SC

“Firm Description

Proposal for Multi-family Objective Design + Development Standards 5
The term “Missing Middle” was coined by Daniel Parolek in 2010 to define a range of multi-unit or clustered housing types, compatible in scale with single-family homes, that helps meet the growing demand for walkable urban living. These building types provide diverse housing options along a spectrum of affordability, including duplexes, fourplexes, and bungalow courts, to support walkable communities, locally-serving retail, and public transportation options. Missing Middle Housing provides a solution to the mismatch between the available U.S. housing stock and shifting demographics combined with the growing demand for walkability, which has been poignantly defined in recent research and publications by the Urban Land Institute, AARP, and industry heavyweights Christopher Nelson and Chris Leinberger.

We use our understanding of Missing Middle Housing types and their important role within walkable neighborhoods to inform our architecture, planning, and urban design work.
“Missing Middle Housing provides homebuilders with a practical way to address changing market and demographic trends—diversifying their portfolios and investing in communities in the process.”

Amy Albert
Editor-in-Chief, Professional Builder
Lisa Wise Consulting

Lisa Wise Consulting, Inc. (LWC) is an award-winning firm with national experience in zoning ordinances and development codes that enable pedestrian and transit-oriented neighborhoods, revitalize built environments, and facilitating sustainable, well-designed places to live, work, and recreate. LWC has a strong resume in zoning code updates, specific plans, and the economics of land use, with a constant focus on placemaking, community involvement, and feasible implementation. They utilize a range of zoning approaches, including form-based, performance-based, and user-based, to devise a strategy tailored to the unique needs of each community.

Plan to Place

Plan to Place is a community engagement and communication firm based in Marin County, founded in 2016. At Plan to Place, they value highly collaborative and inclusive community-based, neighborhood and urban planning efforts. As a full-service engagement firm working primarily with jurisdictions in the Bay Area, they are continually exploring and innovating new outreach tools that are tailored to meet the needs of their clients and the communities they work with. Plan to Place implements an array of communication, facilitation, and engagement platforms designed to provide access to a diverse range of participants.
Relevant Projects and References

This section of our proposal includes a list of references for similar projects. We have included details about our relevant work for your review. Additional information is available upon request.

**Opticos Design**

The Opticos Design team has broad urban design and planning experience that makes us a great fit for this project. Our work includes downtown plans and codes for major California cities, including Oakland, Richmond, and Hayward; TOD and Station Area planning and implementation work for ACE, BART, Amtrak, and SMART; and leadership and involvement in over two dozen downtown revitalization strategies in Central Valley communities. All of our work is defined by broad and meaningful community engagement, including facilitation and participation in over 100 multiday design charrettes following a methodology based on National Charrette Institute training and certification and our own experience working across the country.

1. Novato, CA: *Northwest Neighborhood Study and Code*
   - **Bob Brown**, Former Community Development Director, City of Novato | 415.408.8293 | sustainablebob@gmail.com

2. San Rafael, CA: *Downtown Precise Plan*
   - **Paul Jensen**, Community Development Director, City of San Rafael, 1400 Fifth Avenue, San Rafael, CA 94901 | 415.485.5064 | paul.jensen@cityofsanrafael.org

3. Kaua’i County, HI: *Form-Based Planning and Coding for Kaua’i*
   - **Kaaina Hull**, Director of Planning, County of Kaua’i, 4444 Rice Street, Suite A473, Lihu’e, HI 96766
   - 808.241.4050, khull@kauai.gov

4. Beaufort County, SC: *Multi-jurisdictional LDC and Form-Based Code*
   - **Rob Merchant**, Assistant Community Development Director, Beaufort County Planning Department, PO Drawer 1228, Beaufort, SC 29901, 843.255.2140 | robm@begov.net
**Lisa Wise Consulting**

- Marin County, CA: *Development Code Amendments*
  
  **Jeremy Tejirian**, AICP, Planning Manager, Community Development Agency, 3501 Civic Center Drive, Suite 308, San Rafael, CA 94903 | 415.473.3798 | jtejirian@marincounty.org

- Alameda County, CA: *Ashland and Cherryland Business District Specific Plan and Code Update*
  
  **Rodrigo Orduna**, Assistant Planning Director, Alameda County, 224 W. Winton Avenue, Suite 111, Hayward, CA 94544 | 510.670.6503 | Rodrigo.orduna@acgov.org

- Hayward, CA: *Downtown Specific Plan, Code, and EIR*
  
  **Damon Golubics**, Senior Planner, City of Hayward, 777 B Street, Hayward, CA 94541 | 510.583.4210 | Damon.golubics@hayward-ca.gov

**Plan to Place**

- San Rafael, CA: *General Plan 10-Year Status Report and Housing Element Update*
  
  **Paul Jensen**, Community Development Director, 1400 Fifth Avenue, San Rafael, CA 94901 | 415.485.5064

- Corte Madera, CA: *Tamal Vista Corridor Study*
  
  **Adam Wolff**, Director of Planning and Building, 300 Tamalpais Drive, Corte Madera, CA 94925 | 415.927.5059

- Mill Valley, CA: *Multi-Family Residential and Mixed-Use Design Guidelines and Standards*
  
  **Vincent Smith**, Former Director of Planning and Building, 26 Corte Madera Avenue, Mill Valley, CA 94941 | 707.259.5934
Moving the Discussion from Density to Form and Neighborhood Compatibility

Novato’s Northwest Quadrant, beloved by its longtime residents and located adjacent to the city’s vibrant main street, has wrestled with concerns over development compatibility for decades.

In the 1960s and 70s, numerous apartment buildings were constructed in the small-scale, single-family neighborhood. Their large footprints, paved front parking lots, and often blank, street-facing facades were out of scale and character with the neighborhood and, in 1977, the City reacted by limiting additional apartment construction that would require “the demolition of a sound dwelling.” However, this policy and related subsequent regulations had unintended consequences: very little new development has occurred in the neighborhood since these policies were implemented.

In preparation for an update of its General Plan, the City engaged Opticos to examine the area’s opportunity for walkable housing types. Opticos conducted a neighborhood code analysis to determine what was permitted under current layers of standards, and provided rich diagrams and illustrations to clarify, for both residents and the City, the reality of what was buildable today. The design team then presented alternative design solutions and zoning code recommendations incorporating housing units in forms that were compatible with the existing neighborhood. The team focused on empowering residents and the City to create standards to describe housing options that fit their needs.
Analysis of Existing R10-4.5 Zone

January 2015  |  ©2015 Opticos Design, Inc. Novato Northwest Neighborhood Study

Limiting Factors

Min. Lot Area / Dwelling Unit

Street

Parking Required (and Shown) 8 spaces (2 guest)

Building Height 35 ft

Street

E

D

6' side setback min.

19.10.100.C.4: Stacked Duplex

19.10.100.C.4.a. Description

A small- to medium-sized detached structure under single ownership that consists of two stacked units, both facing the street and within a single building frame, sharing a common space. This type has the appearance of a small to medium single-family home and is appropriately scaled to fit within low-intensity residential walkable neighborhoods.

Street

Typical Build-out Encouraged by Zoning

Small Lot Example: 50 ft x 150 ft

Allowable Building Envelope

Alternate Allowable Building Envelope

Max. Floor Area (sq ft)

Max. Height

Rear Setback

Side Setback

Front Setback

1. Three detached homes

• 3 off-street parking spaces (all covered)

2. Three Stacked Duplexes

• 5 off-street parking spaces (3 covered)

Development Envelope Details

Lot Area

Max. Number of Units

Max. Floor Area (sq ft)

Max. Height

Rear Setback

Side Setback

Front Setback

Building Height

 Pulitzer Neighborhood Study | 2

Above: Pages from the Novato Northwest Neighborhood Code describing regulations for a stacked duplex.

Left: To understand what the current code allowed, the team produced buildout diagrams showing permitted envelopes and the range of housing outcomes they were producing.
Form-Based Planning + Coding for Kaua‘i
Kaua‘i County, HI

Since 2012, Opticos has been working closely with Kaua‘i County to assist in creating more compact and connected communities under Mayor Bernard P. Carvalho’s Holo Holo 2020 sustainability initiative, which has led to numerous efforts to make Kaua‘i more walkable, bikeable, and transit friendly.

Opticos’ work has included consulting on the Kaua‘i County General Plan as well as the South Kaua‘i and Lihu‘e Community Plans. Our work on the South Kaua‘i Plan included an innovative Form-Based Code, which was recognized by the Hawai‘i APA in 2015 when the Plan and Code received both the Outstanding Planning and Best Practice Awards.

For these projects on Kaua‘i, Opticos worked closely with firms PBR Hawaii and SSFM International and island stakeholders.

Top: Transect wedge mapping the most Rural-to-Urban place types. The community plans have included an extensive Place Types analysis to help determine the scale, character, and intensity of future development.

Above: Plans have incorporated extensive public processes bringing community stakeholders, property owners, staff, and consultants together to make informed decisions and guide public realm improvements.

Reference
Kaaina Hull
County of Kaua‘i
4444 Rice Street Suite A473
Lihu‘e, HI 96766
808.241.4050
khull@kauai.gov

Status
In Progress

Awards
2015 APA Hawai‘i Outstanding Planning Award & 2015 APA Hawai‘i Best Practice Award
2019 APA Daniel Burnham Award
Kaua‘i General Plan

In collaboration with SSFM International, Opticos has been working to integrate walkable community types into the General Plan land use framework. The Opticos team has facilitated a series of multiday workshops on the West Side and North Shore of Kaua‘i that aim to understand individual communities’ desired “degree of change” with regards to various aspects of the built environment and ways in which the General Plan land use can guide this anticipated change. Place Types have been utilized to summarize size, intensity, and character and correlate land use designations with new, form-based zoning districts.

Right: Map depicting land use for an area under the General Plan.

Example of “minimal change”:

Above: Street furniture, awnings, and galleries are added to further improve the existing frontage.

Example of “incremental change”:

Adding street-side entrances on buildings, and adding a small new structure, improves this street frontage.

Example of “transformational change”:

A new building with street-lining entrances and galleries replaces a strip-commercial parking lot.

Above: Diagrams used for assessment of the community’s vision for degree of change—from minimal to transformational.
**South Kaua’i Community Plan**

In coordination with its planning and regional-scale efforts, Opticos worked with the community in the South Kaua’i area to draft a Form-Based Code for the area.

Guiding the planning and coding efforts were the concepts of preservation, evolution, and transformation. Opticos worked with the community to identify ways to preserve agricultural character and cultural history, which led to zoning code changes that will intelligently allow the village to evolve over the next twenty years.

The project culminated in a graphically rich and easy-to-understand code tailored to the specific needs of the southern areas of the island. Development standards included references to local building types and provisions for buildings that would enhance the public realm, invigorate local commerce, and encourage walkability for residents and visitors alike.

**Top:** Project visioning included walkable and bikeable streetscapes.

**Above:** The process translated visioning, completed in conversation with community stakeholders, into a Form-Based Code.
**Lihu’e Community Plan**

As part of its work on the island of Kaua‘i, Opticos collaborated with local officials and the public to develop a community plan for the dynamic capital of Kaua‘i and a handful of nearby small towns.

Opticos started the project by asking the community, “What is the Future Going to Be Like?” Incorporating both microscale and macroscale analysis, as well as extensive documentation of community character, the plan Opticos created for the City of Lihu’e presented a truly form-based approach. The Form-Based Code featured a Transect in line with local preferences, including standards for edge and village conditions, as well as larger intensity standards to guide future growth while keeping local character.

**Right:** Local building types make up Transects in the plan.

**Below:** Walkable place type envisioned for Lihue, including a variety of building types and open space.
Preserving and Enhancing Rural Character and Small Town Urbanism in the Lowcountry

Opticos led an effort to create an updated Development Code/Form-Based Code for Northern Beaufort County, SC, that would be shared by Beaufort County, the City of Beaufort, and the Town of Port Royal. The Form-Based Code is a Transect-based code and is intended to implement compact, walkable urbanism in order to protect the remaining places of rural character throughout the county. A place types strategy was also included to provide a bridge between the Comprehensive Plan and the Form-Based Code, most specifically to define where growth should occur. Four multi-day design charrettes were used to engage and educate the community and stakeholders.

The process seeks to enable an innovative TDR program that will assist in preserving the remaining rural lands within Northern Beaufort County and help to implement the repair and retrofit of suburban sprawl in the city and the town. New growth will be channeled toward existing urban areas or carefully regulated to create new, walkable places. With participation from the State Department of Transportation, a Complete Streets Technical Manual was created during the process to ensure effective implementation.

Reference
Rob Merchant
Beaufort County Planning Department
PO Drawer 1228
Beaufort, SC 29901
843.255.2140
robm@bcgov.net

Status
Adopted December 8, 2014

Size and Scale
587 sq. miles, 3 jurisdictions

Awards
2015 CNU Charter Merit Award
2015 Driehaus Form-Based Code Award
1. Understanding Rural Settlement Patterns

2. Establishing a Hierarchy of Walkable Community Types

3. Focusing Growth in Designated Walkable Urban Places

4. Defining the Unique, Localized Elements of Places
LWC was retained by the County of Marin to complete targeted amendments to the County's Development Code.

The primary purpose of the amendments was to address high priority issues which focused on signage, slaughterhouses and poultry farms, community gardens, camping, and telecommunications. The project began with focused interviews with staff members followed by a preliminary analysis memorandum. Objectives of the Code Amendments were to modernize standards and allowed uses, improve clarity of procedures and requirements, and comply with legal mandates while preserving the character of Marin County.

Working in close consultation with County staff, LWC developed definitions and standards for uses that were previously not addressed in the Development Code.

In addition, LWC conducted a detailed analysis and update of the Sign Code considering the content-neutral standard set by the Reed v. Town of Gilbert Supreme Court ruling. Wireless telecommunications facilities standards were also revised to comply with updated legal requirements, including FCC shot clock standards.

Each of the amendments was adopted, concurrent with staff recommendations, by the Marin County Board of Supervisors.
Staff Qualifications
This section of our proposal includes information about each member of the team who will be assigned to work on this project. The organizational chart on the next page indicates each firm's role and the proposed percentage of time that each staff member will dedicate to this project. Resumes for all proposed staff are included in the Attachments section of this proposal, as requested in the RFP.
Organizational Chart

County of Marin
Community Development Agency
Brian C. Crawford, Director
Jillian Zeiger, AICP, Planner
PDHWG Members

Opticos Design
Team Lead, Urban Design, Place Types, Building Types, Objective Design Standards
Stefan Pellegrini, AICP
Principal 20%
Tony Perez
Senior Associate
Director of FBC 25%
Martin Galindez
Senior Designer 35%
Xenia Alygizou
Senior Designer 35%

Lisa Wise Consulting
Site Planning Standards, Review Procedures, Countywide Survey
Lisa Wise, President, 20%
Martha Miller, Director, 25%
Monica Szydlik, AICP, Senior Associate, 25%

Plan to Place
Community Engagement
Dave Javid, AICP, Founder and Principal, 25%
Leah Chambers, Outreach Specialist and Urban Designer, 30%
Project Approach and Understanding
Project Approach

In this section, we describe our approach and understanding of the project. For each task, we have stated the work identified in the RFP and have further clarified or provided additional detail on the approach that will be used to execute the task. In addition, we have proposed optional elements to the work scope recommended to enhance project outcomes. The optional items are listed in the flow of the work scope to relate to the actual work being done.

**General Goals and Objectives**

The Opticos team understands the primary goal of this work is to create objective design and development standards to increase certainty in the review process and streamline approval processes to ensure that local housing production goals are met. Marin County communities share similar physical conditions, development patterns, and “place types”, as well as common regulatory frameworks. A common set of place-based, objective design standards can be applied in places where Marin communities will anticipate future infill development.

Our work program follows the sequence of tasks provided in the RFP and organizes them into 3 related phases. For each task, we have stated the work identified in the RFP and have further clarified or provided additional detail on the approach that will be used to execute the task. In addition, we have proposed optional elements to the work scope recommended to enhance project outcomes. The optional items are listed in the flow of the work scope to relate to the actual work being done.

In the first phase, Understanding, the project team will work with the PDHWG to establish a common understanding of the toolkit components and expectations for the work. Following this kickoff the team will visit each of the participating communities to meet with the local Planning Director and develop a visual inventory of the areas where Objective Design Standards are likely to be applied. Phase I concludes with the Countywide Survey, which will provide insight into and inform the content developed during Phase II and III.

Phase II focuses on the development of the Place Types and Building Types Atlas. Place Types can identify the qualitative characteristics of different aspirational places within Marin communities while building types describe the range of building blocks that can be used to assemble them.

Once the palette of place types and building types has been established and agreed upon for the applicable areas within each jurisdiction, Phase III focuses on the drafting and review of the Objective Design Standards, Review Procedures, and Architectural Styles, readied and presented to local Commissions and Councils for initial review.
Assumptions

• The PDHWG (Planning Director’s Housing Working Group) will be represented by the County’s project manager who will communicate regularly with the Opticos team.

• Each participating community will receive a tailored toolkit of objective design and development standards that will consist of development standards and architectural style standards for up to four zoning districts, and will be supported by changes and/or additions to existing review and processing procedures. Enhancements or additions to this toolkit are available as optional tasks for an additional fee as identified in the following scope of work.

• The Opticos team means some or all team members depending upon the needs of the specific task.

• Optional sub-tasks are stated as the minimum work and fee but may be less or more depending upon discussing the community’s needs and the corresponding work.

Scope of Work

The RFP identifies the required tasks and work. The Opticos team acknowledges those tasks and below, identifies our understanding of and approach to each task.

Phase 1 – Understanding (3 Months)

1. Document Review and Kick-Off. At this meeting, the Opticos team will:

   • Review the basic toolkit that the Opticos team will provide;
   • Review basic Table of Contents, graphic standard and sample chapter;
   • Review optional tasks and associated fees;
   • Identify key questions to include in the countywide survey;
   • Confirm the project boundaries and identify high expectation sites for each community. The Opticos team will discuss the specifics of each high-expectation site at the site visit and work session with each community in Task 2;
   • Distribute data-needs requests to each community.

Meetings: One meeting with the PDHWG up to 4 hours.

Deliverables: None
2. Site Visits and Work Sessions. The Opticos team will work with the PDHWG project manager to schedule a site visit and work session with each participating community. In order to complete the site visits and work sessions over the required 3.5-day period, the Opticos team will schedule up to three hours for each community.

The Opticos team will coordinate with each community for a site visit where part of our team will meet with the Planning Director and staff to review and confirm the direction on:

- The approach to integrating the new standards in the Municipal Code;
- The approach to the Table of Contents, graphic standard, chapters;
- The approach to reflecting the new standards on the zoning map;
- Identify the location of the new standards in the Municipal Code;
- The approach to procedural changes/additions;
- Confirm if the community wants to modify the scope of work with optional tasks.

Another part of our team will be in the field gathering a visual inventory of exemplary developments, identified by each community and/or by the Opticos team, to inform this process and the eventual standards.

Optional Sub-task: Micro-scale Documentation. Opticos will take detailed key measurements of the exemplary developments and tabulate the information for future reference by the public. We call this optional work ‘micro-scale documentation’ because of the specific elements and measurements we take to inform the development standards.

Fee: $3,500 to 7,500 per community depending on the physical area(s) being measured.

Upon concluding all site visits and work sessions, the Opticos team will prepare an existing conditions memo for each community that summarizes the conditions. After distribution of the existing conditions memo, the Opticos team will meet with the PDHWG in a work session to discuss the memo and any clarifications, outstanding questions and/or data needs, and to review next steps.

Meetings: Coordination call with PDHWG; Site visit to each participating community; Follow-up work session with PDWHG

Deliverables: Existing Conditions Memo for each community (up to 10 pages).

Countywide Survey. LWC, in collaboration with David Javid of Plan to Place, will prepare an online survey to gather ideas and concerns related to multi-family design. The survey will introduce the project and its purpose, provide an overview of key elements of multi-family design, and address issues common to all jurisdictions. Using photographs and
graphics, the survey will introduce concepts and frame questions to help the planning team gather constructive input on issues, preferences, and priorities. The survey will be posted on the project website using SurveyMonkey or a similar platform. A report on the survey’s results will be provided to staff and posted on the project website.

Meetings: None

Deliverables: on-line survey tool and survey results

Optional Sub-task: Custom Survey for Each Community. LWC will develop a customized set of survey questions that address issues and opportunities specific to each community. This customized survey may be designed either to supplement or replace the county-wide survey.

Fee: $1,000 per community

Phase 2 – Place Types and Building Types (3 months)

3. Develop Base Map and Objective Design Standard Place Types and Building Types. Using base GIS information from each community, the Opticos team will develop a base map for each community of the parcels within the project boundaries established in Task 2. The Opticos team will then identify the palette of place types that can be applied as needed to the different communities. Each place type will represent existing locations in Marin County and typically identify the place type’s intent, allowable building types and uses, site planning parameters, required building form, and the approach to parking. Building types will describe the physical characteristics and disposition of different types. Each place type will be coordinated with each community’s existing zoning code as to the zone(s) that implement it, or if zones need to be added or amended to implement the place type. This information will guide the preparation of detailed objective design and development standards in each community.

Meetings: None
Deliverables: PDF base map for each community; PDF catalog of Marin County Place Types coordinated for each community.

4. Present Draft Place Types and Building Types. The Opticos team will facilitate a meeting of the PDHWG to present the Draft palette of Place Types and Building Types. This presentation will identify which Place Types and Building Types already exist in each community and which are recommended based on community objectives communicated to the Opticos team. The palette and recommendations will be reviewed by each community. Written comments will be compiled into one set of non-contradictory comments for the Opticos team to use in preparing the Final palette of Place Types and Building Types.

Optional Sub-task: Pro-forma Analyses. LWC will prepare pro-forma analyses on a ‘per building type’ basis for up to 10 building types (i.e., up to 10 proformas). LWC will obtain inputs for the proformas, which may include sourcing data from the County; cities within the county; local developers, builders, and real estate professionals; publicly available online sources; or others. LWC will utilize construction costs and market prices that reasonably represent countywide conditions unless otherwise agreed upon by the County, LWC, and the consulting team.

Fee: $19,890 for up to 10 building types.

Optional Sub-task: Detailed Site Testing. Opticos will prepare up to 3 site and yield plans per selected site that test different building types under similar or different conditions. Opticos will advise on site selection so that the findings can be used for as many sites as possible. Each testing will be illustrated in axonometric diagrams with yield information in table format. This information can further inform the preparation of the Administrative Draft standards as well as help answer questions from the public.

Fee: $7,500 per site

Meetings: Presentation of Draft to PDHWG

Deliverables: PDF atlas of Draft Place Types and Building Types for Marin County and for each community
5. **Present Final Place Types and Building Types to PDHWG (via Conference Call).**

Upon reviewing the PDHWG’s comments on the Draft, the Opticos team will prepare and present the Final palette Place Types and Building Types to the PDHWG. Each Place Type will include up to 4 examples of locations and Building Types that implement the Place Type’s intent. The Final palette and recommendations will be reviewed by each community. Written comments will be compiled into one set of non-contradictory comments for the Opticos team to use in preparing the Administrative Draft.

**Meetings:** Conference Call

**Deliverables:** PDF atlas of Final Place Types and Building Types for Marin County and for each community

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6. **Administrative Draft.** Upon reviewing the PDHWG’s comments on the Final Place Types and Building Types, the Opticos team will prepare the Administrative Draft Objective Design and Development Standards. The Opticos team will prepare the Administrative Draft based on the direction received from each community in Task 2. The Opticos team will present the Administrative Draft to the PDHWG. The Administrative Draft will be reviewed by each participating community. Written comments will be compiled into one set of non-contradictory comments for the Opticos team to use in preparing the Final Draft.

**Optional Sub-task:** Individual Meetings to Review Administrative Draft. Opticos will facilitate an in-person meeting of up to 4 hours with each community to present and discuss their Administrative Draft Standards. Alternatively, this meeting can occur after a community’s review of the Draft but prior to compiling their comments for submittal to the Opticos team.

**Fee:** $2,500 per meeting.

**Meetings:** Conference Call with PDHWG to present Administrative Draft

**Deliverables:** PDF of Administrative Draft
7. Develop Procedural Changes. Based on the review of each city’s existing administrative procedures, community input, working group discussions and team discussions, LWC will prepare an Admin Draft of administrative procedures for inclusion in each participating city’s Toolkit.

Meetings: None

Deliverables: Administrative Draft of Procedural Changes

8. Develop Architectural Styles Pattern Book. The Opticos team will prepare an Architectural Styles chapter for each participating community. This chapter will be part of the Supplemental Standards section of each community’s objective design and development standards. The chapter will describe the intent of the architectural standards, provide illustrations for each architectural style, and include checklists of materials and finishes, lighting standards, siding, rooflines, fenestrations, eaves, color, cornice lines, and balconies. The chapter will identify the required approach with existing historic buildings, and placement of architectural elements.

Optional Sub-task: Detailed Architectural Style Documentation. Opticos will prepare detailed architectural style documentation to better support the architectural styles chapter and its standards.

Fee: $6,500 to $10,000 per community.
The Administrative Draft will be reviewed by each community. Written comments will be sent by each community to the Opticos team for preparing the Final Draft.

Meetings: None

Deliverables: PDF of Architectural Styles chapter

10. Final Draft. The Opticos team will prepare the Final Draft and circulate it to the PDHWG for comment. The Final Draft will consist of: a) the Objective Design and Development Standards and Supplemental Standards including the Architectural Styles chapter, and b) procedural changes and/or additions. The Final Draft will be reviewed by each community. Written comments will be sent by each community to the Opticos team for preparing the Final Draft to be presented in the public hearing process.

Meetings: None

Deliverables: PDF of Final Draft

Optional Sub-task: Screencheck Draft. Prior to preparing the Final Draft, the Opticos team will use the direction received for the Final Draft and first prepare a Screencheck draft for the Director and staff to review. The Opticos team will receive consolidated comments from the community and prepare the Final Draft to be released for public comment.

Fee: $27,000 for each community.

Optional Sub-task: Implementation Strategy Meeting. The Opticos team will participate in one implementation strategy meeting with each community (a total of 10 meetings) to discuss issues of specific importance to each community; additional on-line or in-person outreach needs; additional public hearings needed; and additional work products needed. Following each meeting, the consulting team will produce a recommended strategy for each community to move forward with its process.

Fee: $3,000 per meeting

11. Public Hearings. The Opticos team will up to one meeting (Council or Planning Commission) per participating community and provide support for up to two additional meetings via conference calls.

Meetings: Attendance by one person at up to 14 meetings (2 via conference calls)

Deliverables: None

Optional Sub-tasks related to Public Hearings/Engagement.

Community Engagement Plan. David Javid of Plan to Place is available to organize a community engagement plan for more thorough public engagement.

- Outline project goals and objectives;
- Identify engagement activities;
- Identify target demographic and interest groups and identify methods of communication and engagement;
- Confirm coordination, facilitation and communication responsibilities; and outline schedule, format, and resources for all engagement activities.

Fee $2,010
Public Hearing Assistance. David Javid of Plan to Place is available to assist at public hearings.

Fee $1,340 per meeting

Pop-up Workshops. Plan to Place will facilitate pop-up workshops or “intercept” meetings designed to meet with the community at locations and times that are convenient for them. Typically occurring at central locations or community events, these meetings provide an opportunity to share information and gather input through interactive and approachable tools.

Anticipated roles and responsibilities:
• Coordinate with Opticos Design and City staff to prepare workshop materials
• Organize set up logistics as needed (e.g., table, tent, easels)
• Facilitate each pop-up workshop
• PDHWG/City staff to help coordinate location logistics
• Prepare workshop notes

Fee: $2,010 per 4-hour workshop

Real-Time Balloting. As part of the community workshops, Plan to Place can prepare and facilitate surveys using polling software and handheld remotes or clickers to administer real-time balloting at designated meetings to foster interactive input on meeting topics. The greatest advantage of this approach is it gives an equal voice to everyone in the room and provides access everyone to the process. Equally important is the ability to instantaneously see the results in real-time to gauge interest in the room and allow for a discussion to uncover why participants made certain choices.

Fee: $2,680 per meeting (includes ballot setup and summary)

Stakeholder/Focus Group Meetings. Plan to Place can facilitate up to four, 50-minute, one-on-one or focus group meetings with key stakeholders and community ambassadors/ connectors to allow participants to share their aspirations and potential concerns, and provide input.

Anticipated roles and responsibilities:
• Collaborate with Opticos Design and City staff to identify stakeholder meetings (business, neighborhood or focus groups) and draft objectives and agendas
• Team with Opticos Design to co-facilitate meetings
• Opticos Design and City staff will prepare meeting materials*
• Plan to Place and Opticos Design will summarize the key takeaways from each meeting
• PDHWG/City staff will coordinate stakeholder meeting schedules and identify meeting locations and related logistical items
Fee: $3,000 per 2-hour meeting (includes summary notes)

*Fee: $2,500 to $5,000 per meeting depending on the complexity of the materials requested

Community Workshops. Plan to Place will collaborate with the Opticos Design team and City staff in the preparation for and execution of community workshops to discuss topics related to the project.

Anticipated roles and responsibilities:

- Work with the project team to prepare an overall purpose, approach, objective and anticipated outcome of the community workshops.
- Prepare meeting materials including agendas, sign-in sheets and assist with interactive activities to get input on the strategies and deliverables prepared by Opticos Design.
- Co-facilitate each workshop.
- PDHWG /City staff will coordinate meeting location logistics (e.g., room, a/v equipment, refreshments).
- Assist with meeting logistics including room set up and break-down.
- Prepare summary notes.

Fee: $6,500 per 4-hour workshop

Left: Opticos’ approach to Place Types as created for the Kaua‘i General Plan.
Branding. In order to prepare an identifiable and consistent brand for this project, particularly as it’s rolled out through multiple jurisdictions throughout the County, Plan to Place will assist with the following tasks:

- **Style Guide** - The first step to creating branding materials will be to prepare a Style Guide that identifies the fonts, color schemes, and graphic design elements. The proposed Style Guide will build off of the new city-wide branding effort currently underway.

- **Project Logo and Outreach Templates** – once the Style Guide is approved, Plan to Place can create a project logo and related icons, document templates and graphic style guidelines to be used for all project related meeting materials and deliverables, as well as promotional and marketing of the local business community through the City’s social media and other digital platforms.

**Fee:** $3,800

Optional Sub-task: **Study Session.** Opticos is available to facilitate Council and/or Planning Commission study sessions on the standards.

**Fee:** $7,500 per study session (includes preparation of session materials/presentation)

12. **Final Submission.** In response to the adoption process for each participating community, the Opticos team will make targeted edits to the Objective Design and Development Standards, including the procedural changes and/or additions. Upon completing this task, the Opticos team will provide the electronic files to the PDHWG project manager for distribution to each community.

**Meetings:** None

**Deliverables:** Final digital copy of ODDS including PDF, InDesign file, and GIS layers.

13. **Project Management.** Opticos will provide coordination between its team and the PDHWG through one point of contact: Tony Perez. Opticos will facilitate weekly coordination calls with the PDHWG project manager for the first 6 months of the project and bi-weekly coordination calls for the rest of the schedule.
Timeline

Month 1
1. Document Review/Kickoff
   - Milestone Meeting A

Month 2
2. Site Visits/Work Sessions
   - Milestone Meeting B

Month 3
3. Countywide Survey

Month 4
4. Draft Place + Building Types Atlas

Month 5
5. Present Draft Place + Building Types Atlas
6. Final Place + Building Types Atlas

Month 6
7. Administrative Draft Objective Design Standards
8. Review Procedures
9. Architectural Styles Pattern Book
10. Final Draft Objective Design Standards
11. Public Hearings
12. Final Submission
13. Project Management

Milestone Meetings

A. Document Review and Kickoff (PDHWG #1)
B. PDHWG #2
C. PDHWG #3
D. PDHWG #4
E. PDHWG #5 (Conference Call)
Cost Proposal Summary
Cost Proposal

This section of our proposal provides a proposed project budget for the scope of services provided in the RFP. The enclosed budget includes total direct costs and all other costs associated with the scope of services provided, including salaries, fringe, benefits, travel, indirect costs, overhead, profit, and State excise tax.

Fees by Task

<table>
<thead>
<tr>
<th>Task</th>
<th>Opticos Design</th>
<th>Lisa Wise Consulting</th>
<th>Plan to Place</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Document Review + Kickoff</td>
<td>$13,500</td>
<td>$18,000</td>
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<td>2. Site Visits + Work Sessions</td>
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<td>3. Countywide Survey</td>
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<td>4. Develop Base Maps</td>
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<td>5. Present Draft Place Types</td>
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<td>6. Present Final Place Types</td>
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<td>7. Admin Draft</td>
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<td>8. Develop Procedural Changes</td>
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<td>11. Public Hearings</td>
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<td>12. Final Submission</td>
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<td>13. Project Management</td>
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<td>Total Fee (including expenses)</td>
<td>$351,495</td>
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Hourly Rates

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<th>Position at Opticos Design</th>
<th>Hourly Rate</th>
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<tbody>
<tr>
<td>Principal</td>
<td>$290</td>
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<tr>
<td>Senior Associate</td>
<td>$225</td>
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<tr>
<td>Associate</td>
<td>$195</td>
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<tr>
<td>Senior Designer</td>
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<tr>
<td>Designer</td>
<td>$152</td>
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<td>Admin</td>
<td>$100</td>
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## Fees by Optional Task

<table>
<thead>
<tr>
<th>Task</th>
<th>Opticos Design</th>
<th>Lisa Wise Consulting</th>
<th>Plan to Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Site Visits + Work Sessions</td>
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<td></td>
<td></td>
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<tr>
<td>Micro-scale Documentation</td>
<td>$3,500-$7,500 per community</td>
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<tr>
<td>3. Countywide Survey</td>
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<td></td>
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<tr>
<td>Custom Survey for each community</td>
<td>-</td>
<td>$1,000 per community</td>
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<tr>
<td>5. Present Draft Place Types</td>
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<tr>
<td>Pro-forma Analysis</td>
<td>-</td>
<td>$1,989 per building type</td>
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<td>Detailed Site Testing</td>
<td>$7,500 per site, up to 3 sites per community</td>
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<tr>
<td>7. Admin Draft</td>
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<td></td>
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<tr>
<td>Individual Meetings to Review Admin Draft</td>
<td>$2,500 per community</td>
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<td>-</td>
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<tr>
<td>9. Architectural Styles Pattern Book</td>
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<tr>
<td>Detailed Architectural Style Documentation</td>
<td>$6,500-$10,000 per community</td>
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<td>10. Final Draft</td>
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<td>Screencheck Draft</td>
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<td>Implementation Strategy Meeting</td>
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<td>11. Public Hearings</td>
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<td>Community Engagement Plan</td>
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<td>Public Hearing Assistance</td>
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<td>$1,500 per meeting</td>
<td>$1,340 per meeting</td>
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<tr>
<td>Pop up Workshops</td>
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<td>$2,010 per workshop</td>
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<tr>
<td>Real-time Balloting</td>
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<td>$2,680 per meeting</td>
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<td>Stakeholder/Focus Group</td>
<td>$2,000 per meeting</td>
<td>$1,500 per meeting</td>
<td>$1,000 per meeting</td>
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<td>Supporting Materials</td>
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<td>Community Workshops</td>
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<td>$4,000 per workshop</td>
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<tr>
<td>Branding</td>
<td>-</td>
<td>-</td>
<td>$3,800 total</td>
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</table>

### Additional Terms

1. Budget does not include rental or purchasing fees for space or equipment for workshops, charrettes and other meetings. (Consultant to bring computers and drafting supplies.) Consultant will not be responsible for any such planning or expenses.
2. Budget does not include food for participants other than the design team for workshops, charrette and working sessions.
3. Budget does not include postage associated with public outreach and marketing.
4. Budget does not include installation of any and all public outreach media including but not limited to banners and signage.
5. Client shall be paid on a fee basis in accordance with the table enclosed.
Attachments
Stefan Pellegrini

Education
Master of Urban Design
University of California, Berkeley
Bachelor of Architecture
Magna Cum Laude
University of Notre Dame

Licenses
California Licensed Architect
#C32904

Memberships
American Institute of Certified Planners
Certificate #020186
American Planning Association (APA)
Small Town and Rural (STAR) Division

Relevant Project Experience
Beaufort County Multi-jurisdictional Coding Strategy, Beaufort County, SC
South Kauai Community Development Plan and Form-Based Code, Kauai County, HI
Honolulu Primary Urban Core Development Plan, Honolulu, HI
Memphis 3.0, Memphis, TN
Richmond Livable Corridors, Richmond, CA
Downtown Hayward Plan, Hayward, CA

Opticos Design, Inc
Principal

Stefan Pellegrini’s educational degrees and professional experience in both architecture and urban design make him an expert project leader at all building scales, from single-family homes to regional plans. He has extensive experience traveling and teaching workshops abroad, a roster of groundbreaking and award-winning projects to his credit, and he is uniquely skilled at bringing diverse people and opinions together at the table to resolve conflicts and turn disagreements into productive projects. Adept at analyzing a place and drawing his ideas on paper, with a passion for traditional architecture, Stefan meticulously considers every aspect and angle of a project to create beautiful places and spaces that thrive.

His strong interest in revitalizing places, especially rural small towns and inner-city areas, comes from a childhood spent in the rust belt town of Muncie, Indiana, seeing first-hand the impact of declining industry. Before joining Opticos in 2002, Stefan brought this understanding to his work at the nationally renowned firm Urban Design Associates in Pittsburgh, Pennsylvania, where he was a senior designer and project manager for over 50 urban design and architecture projects, including groundbreaking plans that redesigned public housing into mixed-income communities through the HOPE VI program in five states (one of which won an AIA Honor Award for Urban Design), and new housing developments in North Carolina and Alabama. He also played an instrumental role in UDA’s resurrection of Architectural Pattern Books.

Stefan brings an international perspective to the firm. The recipient of a number of fellowships, including the prestigious Skidmore, Owings, and Merrill Foundation Urban Design Traveling Fellowship, he has spent months studying architecture and planning all over the world, including Scandinavia, North Africa, and Southern Europe. He teaches a number of international design workshops in Mexico, China, and Japan, and he is a lecturer in the Urban Design program at the University of California, Berkeley—all of which gives global depth and understanding to his work. In addition, Stefan is fluent in Italian.

When not traveling or working, Stefan explores his own very mixed-use neighborhood in San Francisco either on foot or on his bicycle and often accompanied by his two sighthounds. He takes public transit to work every day. He’s also an avid cook.
Tony Perez

Opticos Design, Inc

Director of Form-Based Coding

With 30 years of experience—12 as a public sector planner and the past 18 as a consulting professional writing Form-Based Codes—Tony is an expert at working with communities to establish and translate policy direction into clear and implementable development standards. His experience in the public and private sectors gives him sharp focus and broad perspective to ensure that the standards articulated will implement policies and deliver expected visions.

Tony learned the craft of preparing Form-Based Codes while working on a variety of projects with Stefanos Polyzoides, Paul Crawford, Alan Loomis, and David Sargent—and most recently with Dan Parolek, Karen Parolek, Stefan Pellegrini, and John Miki. Tony is fluent in the language of urban design and architecture, enabling him to extract maximum information and direction out of a vision while asking important questions of the designers and stakeholders in the process. Tony is also adept at integrating each Form-Based Code with the community’s existing regulations and procedures.

Tony has authored or co-authored over 25 codes and peer-reviewed or contributed to over 20 others. His codes range in scale—from small neighborhood codes to corridor and suburban shopping center transformations to citywide codes. In many efforts, he has incorporated a hybrid approach: form-based zoning for walkable urban areas and improved conventional zoning for auto-oriented suburban areas. His work on the City of Santa Ana’s Transit Zoning Code was one of two winners in the United States of the 2012 Driehaus Award for Form-Based Codes, and he was part of the team that prepared the 2018 Driehaus Award-winning Akanda SmartCode for Libreville, Gabon.

A leader in advancing the practice of Form-Based Coding, Tony was on the 2016 Driehaus Award Jury and is a board member of the Form-Based Codes Institute. As an FBCI instructor, he increasingly enjoys working with public sector planners across the U.S. to train them in using and explaining Form-Based Codes. He teaches Form-Based Planning and Coding to graduate and undergraduate students in major universities.

Tony is nearing completion of a case study book titled The Mexican Patio House, which analyzes 30 patio house buildings ranging from small urban houses to civic buildings to haciendas from Central Mexico. Tony is from the small California Delta town of Isleton and lives with his family in Camarillo.

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Education

B.S. Urban and Regional Planning
Cal Poly Pomona

Teaching

Instructor: UP 252 “Form-Based Planning and Coding,” UCLA, Winter 2015 and 2016
Instructor: URP 498 “Form-Based Planning and Zoning,” Cal Poly Pomona, Spring 2013, 2017, 2018
Instructor: FBC 101 & 201, Form-Based Codes Institute

Relevant Project Experience

NAHB National Missing Middle Housing and ADU Study
Northwest Neighborhood Study and Code, Novato, CA
Citywide Land Development Code Diagnosis, Oklahoma City, OK
Vallejo Citywide Code Update with Code Diagnosis, Vallejo, CA
Sonoma Boulevard Specific Plan, Vallejo, CA
Town Center Specific Plan, Cupertino, CA
Doheny Village Form-Based Code, Dana Point, CA
Transit Zoning Code, Santa Ana, CA (prior to joining Opticos)
Martin Galindez

Opticos Design, Inc

Senior Designer

Born in El Paso and raised in Ciudad Juarez at the Texas/Mexico border, Martin Galindez brings conceptual clarity, a rigorous approach, and an attention to the needs of all users in his urban design and architecture projects. At the center of much of his work is a focus on community interaction and the usable, functional spaces for diverse cultures and a variety of environments.

Seeking to inform design solutions by understanding the needs of a place, Martin is highly interested in urban form and the potential to inspire change, enhance the public realm and establish a better character for it.

Since joining Opticos, Martin has been a key contributor, urban designer, and code writer for Austin’s CodeNEXT Land Development Code rewrite, which seeks to create a new development code to support walkability, equity and community character in Austin, Texas. Martin has also supported a dynamic community process guiding the creation of a town center in Cupertino, California (just a stone’s throw from Apple’s new headquarters).

Prior to joining Opticos, Martin developed his design approach at Pratt Institute and UC Berkeley. At Cal, he applied concepts of place identity and community engagement to his thesis project, in which he proposed a binational walkable community at the border of Ciudad Juarez, Chihuahua, Mexico and El Paso, Texas. His design presented a “car-light” border crossing, with a new light rail link and pedestrian bridge between sister downtowns and just one auto throughway.

Outside of Opticos, Martin is a self-proclaimed gastronomist and cultural explorer. He enjoys tasting and making great food, including his signature rajas con queso—poblano chiles sliced with cheese and cream.
Xenia Alygizou

Opticos Design, Inc
Senior Designer

Xenia Alygizou is an urban designer who is passionate about the intersection of urbanism and sociology. For the past five years, she has researched utopian urbanism theories, applied participatory design processes to her work, and examined incremental design approaches at the neighborhood level.

Since joining Opticos Design, Xenia has contributed to comprehensive plans, master plans, precise plans, and research and development for innovative design concepts and approaches. For the Memphis 3.0 Comprehensive Plan, Xenia helped the community participate in the process through a charrette and worked on the land use plan using GIS. For the Downtown Davis Specific Plan and Form-Based Code, she worked on analysis and helped to prepare the Administrative Draft Specific Plan. Xenia also assessed land use designations and placetypes for the Primary Urban Center Development Plan Update for the City of Honolulu.

Education
Masters and Bachelor of Architecture, National Technical University of Athens
Master of Urban Design, University of California, Berkeley

Awards
Departmental Award, University of California, Berkeley 2016-2017
Grant award from Urban Design Faculty of CED, Berkeley, 2016-2017
Award of Gerondelis Foundation for the completion of the studies in CED

Relevant Projects
San Rafael, Downtown Precise Plan
Memphis 3.0, Memphis, TN
NAHB National Missing Middle Housing and ADU Study
As a certified planner and public accountant, Lisa has over 30 years of experience in zoning code updates, land use economics, housing policy, financial feasibility analysis, and the management of complex projects. Lisa is considered a national expert on code reform and housing policy and presents on the topics regularly at State and National APA, League of California Cities, ULI, and the New Partners for Smart Growth conferences. Lisa recently received the CNU Paul Crawford award for Excellence in Planning. She is the former Chair and currently serves on the Steering Committee of the Form Based Code Institute, as adjunct faculty and lectures on Urban Planning and Real Estate Finance at California Polytechnic State University in San Luis Obispo and on the Dean’s Leadership Council.

Lisa has been directly responsible for a breadth of large-scale projects that assess land use policy and economic performance, and ultimately make recommendations for more vibrant and resilient communities. These include 34 code updates, 35 economic projects, 23 master and specific plans, 20 housing elements, and several inclusionary and employee housing studies.

Prior to starting LWC in 2006, Lisa worked for land use planning firm Crawford, Multari & Clark Associates. From 1990 to 1999, Lisa was a Manager at PricewaterhouseCoopers (PwC), one of the “Big Four” international accounting, financial services and management consulting firms. At PwC, Lisa’s responsibilities included managing large financial services engagements, building client relationships, mentoring staff, and teaching in-house classes.

Relevant Project Experience:
- Alameda County, CA, Ashland Cherryland Business District Specific Plan Update and Form Based Code
- Austin, TX, Land Development Code Update
- Benicia, CA, Mixed-Use Master Plan and Form Based Code
- Beverly Hills, CA, Economic Sustainability Plan
- Cincinnati, OH, Neighborhood Annexation Form Based Code Study
- Flagstaff, AZ, Zoning Ordinance Update
- Grover Beach, CA, Zoning Code Update and West Grand Ave. Master Plan
- Hayward, CA, Downtown Specific Plan and Form Based Code
- Kingsburg, CA, Development Code Update, Form Based Code, and Economic Study
- Las Vegas, NV, Downtown Form-Based Code
- Livermore, CA, Development Code Update
- Lompoc, CA, Zoning Code Update
- Long Beach, CA, Short Term Rental Housing Program and Regulations
- Malibu, CA, Zoning Code and Local Implementation Plan Update
- Mesa, AZ, Form Based Code and Regulating Plan
- Petaluma, CA, SMART Rail Station Areas: TOD Master Plan
- Richmond, CA, Livable Corridors Plan and Form Based Code
- San Luis Obispo, CA, Economic Development Strategic Plan
- Soledad, CA, Downtown Specific Plan, Vision, and Form Based Code
- Tehachapi, CA, Zoning Code Update, Housing Element 4th/5th Cycle
- Westerville, OH, Zoning Code Update

PAST WORK EXPERIENCE
California Polytechnic State University
San Luis Obispo, CA, Adjunct Faculty, 2002 - Present
Crawford, Multari & Clark Associates
San Luis Obispo, CA, Professional Consultant, 2001 - 2006
San Luis Obispo County
San Luis Obispo, CA, Staff Planner, 2000 - 2001
Governor’s Office of Planning & Research
Sacramento, CA, Intern, 1999 - 2000
PricewaterhouseCoopers, LLP
New York, NY, Financial Services Manager, 1990 - 1999
NBD Chicago Bank
Chicago, IL, Personal Banking Representative, 1988 - 1989

EDUCATION
California Polytechnic State University
San Luis Obispo, CA, Master of City & Regional Planning, 2001
DePaul University
Chicago, IL, M.S. Accountancy, 1990
University of Cincinnati
Cincinnati, OH, B.S. Business Administration in Marketing & Finance, 1987

CERTIFICATIONS & MEMBERSHIPS
American Planning Association (APA)
2001 - Present
Certified Public Accountant, 1991
Congress for New Urbanism
2003 - Present
Paul Crawford Award for Excellence in Planning, 2017
Form-Based Code Institute
Chair, 2015 - 2018, Treasurer, 2014 - 2015
Dean’s Leadership Council
California Polytechnic, School of Architecture 2018-Present
MARTHA MILLER, AICP
Director

Martha Miller has over 15 years experience as a land use planner and project manager specializing in development regulations, specific plans, master plans, transit-oriented development strategies, and community engagement. Her experience as a public sector planner, where she managed comprehensive community plan updates, subdivisions plans, and development and entitlement projects brings a unique and valuable perspective to LWC. Martha’s strength is leading complex projects with multiple subconsultants on technical ordinances for industrial land use regulations, landscaping, hillsides, parking, sustainability, planned development, and community benefits. Martha’s approach to making better cities is marked by a careful assessment of client needs and available resources, and bringing best practices from form-based, performance-based, and Euclidean applications.

Relevant Project Experience:
- Alameda County, CA, Castro Valley General Plan Implementation
- El Monte, CA, Comprehensive Zoning Ordinance and Citywide Design Guidelines Update
- Fresno, CA, Development Code Update
- Goleta, CA, New Zoning Ordinance and Coastal Implementation Plan
- Hayward, CA, Industrial District Regulations Update
- Hayward, CA, Form-Based Codes Update
- Honolulu, HI, Transit Oriented Development Land Use Ordinance Amendments
- Lake Tahoe, CA, Tahoe Region Local Planning Implementation
- Morro Bay, CA, Comprehensive Zoning Code and Coastal Implementation Plan Update
- Mammoth Lakes, CA, Commercial Districts Development Standards
- Newark, CA, Comprehensive Zoning Ordinance Update
- Placer County, CA, Area Plan and Implementing Ordinance
- Porterville, CA, Development Code Update
- Pomona, CA, Zoning and Subdivision Code Update
- Princeton, San Mateo County, CA, General Plan, Zoning, and Local Coastal Plan Update
- San Carlos, CA, Zoning Ordinance Update
- San Gabriel, CA, “Greening the Code” Zoning Amendments
- Santa Barbara, CA, New Zoning Ordinance
- South San Francisco, CA, Zoning Ordinance Update
- West Hollywood, CA, Norma Triangle Neighborhood Overlay District and Design Guidelines
- West Sacramento, CA, Zoning Modernization Project
- Yuba County, CA, Development Code Update

PAST WORK EXPERIENCE

California Polytechnic State University
San Luis Obispo, CA, Lecturer, 2017 - Present

RRM Design Group
San Luis Obispo, CA, Principal Planner, 2015 - 2017

Dyett & Bhatia Urban and Regional Planners
San Francisco, CA, Principal, 2008 - 2015

San Luis Obispo County
San Luis Obispo, CA, Senior Planner, 2004 - 2008
Planner, 2000 - 2003

Sapphos Environmental
Pasadena, CA, Urban Planner/Environmental Analyst, 2003 - 2004

EDUCATION

California Polytechnic State University
San Luis Obispo, CA, Master of City & Regional Planning
Purdue University
West Lafayette, IN, B.S. Industrial Engineering

CERTIFICATIONS & MEMBERSHIPS

American Institute of Certified Planners
2004 - Present

American Planning Association
2002 - Present
California Central Coast San Luis Obispo Subsection Director (2015 - 2017)

AWARDS

American Planning Association, 2014
Los Angeles Section Award, San Gabriel “Greening the Code”

SCAG Sustainability Award, 2014
San Gabriel “Greening the Code”
MONICA SZYDLIK, AICP  
Senior Associate

Monica brings over 14 years' experience in planning and design to the firm. Her career has focused on leading transit-oriented development plans, streetscape design, design guidelines, form-based development regulations, and zoning code updates. Her skills include managing multi-disciplinary teams, clear and informative communication with client and team members, facilitating community outreach events, and coordinating presentations and deliverables. Monica integrates graphic tools into her work such as 3-D modeling and diagramming and photo simulations. Monica's background includes and emphasis on architecture and landscape design.

The core of Monica's professional career is physical planning and urban design with an emphasis on supporting livable and sustainable neighborhoods and communities. Monica holds a Master of Architecture from the University of Michigan, Ann Arbor, and a Bachelor of Arts in History from the University of California, Berkeley.

Relevant Project Experience:

- Avondale, AZ, Avondale City Center Specific Area Plan
- Belmont, CA, Belmont Village Specific Plan
- Burbank, CA, Single-Family Neighborhood Compatibility and Design Project
- Half Moon Bay, CA, Poplar Beach Gateways Plan
- Henderson, NV, Development Code Update
- Honolulu, HI, Downtown and Kalihi Neighborhood TOD Plans
- Honolulu, HI, Public Views Study
- Livermore, CA, Isabel Neighborhood Plan and EIR
- Paso Robles, CA, Beechwood Specific Plan, Beechwood Owners Group
- Oakland, CA, Oakland-Alameda Freeway Access Plan
- Redwood City, CA, Hillside Regulations
- Redwood City, CA, Residential Design Guidelines
- San Bruno, CA, Bayhill Specific Plan
- San Diego, CA, Mission Valley Community Plan - Urban Design
- San Francisco, CA, Bayshore Station Relocation Project
- San Jose, CA, Santana Row/Valley Fair and Winchester Boulevard Urban Village Master Plans
- San Pablo, CA, San Pablo Avenue Specific Plan
- San Ramon, CA, Crow Canyon Specific Plan
- Santa Cruz County, CA, Santa Cruz County Accessory Dwelling Unit Study
- South Lake Tahoe, CA, Tahoe Valley Development and Design Standards
- South San Francisco, CA, El Camino Real/Chestnut Avenue Area Plan
- Tehachapi, CA Oak Tree Village Specific Plan
- Vacaville, CA, Land Use and Development Code Audit

PAST WORK EXPERIENCE

Dyett & Bhatia Urban and Regional Planners  
Oakland, CA, Senior Associate, 2006 - 2018

Kirk Miller Affiliates  

EDUCATION

University of Michigan, Ann Arbor  
Master of Architecture

University of California, Berkeley  
B.A. History

CERTIFICATIONS & MEMBERSHIPS

American Institute of Certified Planners  
2017 - Present  
License #330767

AWARDS

APA, California Chapter Award of Excellence, 2018  
Belmont Village Specific Plan

APA, Hawaii Chapter Honor Award for Urban Design, 2016  
Downtown and Kalihi Neighborhood TOD Plans

APA, California Northern Section Award of Honor for Neighborhood Planning, 2012  
El Camino Real/Chestnut Avenue Area Plan

APA, Arizona Chapter Award, Master Plan Category, 2009  
Avondale City Center Specific Area Plan
DAVE JAVID, AICP, LEED AP

Founder + Principal

Dave has over 15 years of experience leading a diverse range of award-winning community-based planning efforts. Dave’s experience as a project manager on vision, corridor, strategic and specific plan projects has provided invaluable insight on the opportunities and the challenges of balancing jurisdictional objectives while meeting community expectations. By implementing a range of engagement and communication platforms, Dave has forged relationships with key community leaders to establish partnerships and a common dialogue that has led to successful policy outcomes.

FEATURED PROJECTS

DOWNTOWN PRECISE PLAN | SAN RAFAEL, CA
Collaborating with Opticos Design and City staff on the demographic analysis and community engagement strategy for the Downtown Precise Plan.

COMPREHENSIVE PLAN | MEMPHIS, TN
Teamed with an Opticos Design led team along with I-SEEED/Streetwyze, City staff and local firms to implement an engagement strategy (e.g., walking tours, community capacity building workshops and teaming with local organizations and artist/ethnographers).

GP 10-YEAR REVIEW + HOUSING ELEMENT UPDATE | SAN RAFAEL, CA
While at M-Group, worked closely with City staff to draft a 10-year review of its 2004 General Plan to provide a progress report on short and long-term implementation policies and programs. This has led to a targeted General Plan Amendments as an interim update to meet the latest statutes and report the City’s accomplishments.

2015-2023 HOUSING ELEMENT UPDATE AND DESIGN GUIDELINES | MILL VALLE, CA
While at M-Group, managed the update working closely with City staff, an Ad Hoc Committee, and a Housing Advisory Committee. In addition, Special Needs zoning, Commercial and Residential Zoning District Use and Development Standards, Multi-Family Residential Design Guidelines, and Parking Standards were also prepared.

TAMAL VISTA CORRIDOR STUDY | TOWN OF CORTE MADERA, CA
While at M-Group, managed a comprehensive community engagement process to explore land use and circulation assets and opportunities along a major corridor through the heart of the Town of Corte Madera.

ADDITIONAL RELEVANT PROJECTS

2015-2023 HOUSING ELEMENT UPDATE | Sausalito, CA
DOWNTOWN PAVING, SIDEWALK AND UTILITY UPGRADE | Mill Valley, CA
DIRIDON STATION AREA COMMUNITY ENGAGEMENT | San Jose, CA
DOWNTOWN SPECIFIC PLAN AND EIR | San Mateo, CA
DOWNTOWN VISION PLAN | Los Altos, CA
ADELINE CORRIDOR PLAN - RACIAL EQUITY LENS TOOL | Berkeley, CA
LEAH CHAMBERS
Outreach Specialist + Urban Designer

Leah Chambers is a versatile urban design and public outreach consultant with a background in the architecture, design, and community planning industry. With both national and international experience, she has a diverse portfolio of multi-disciplinary projects for both public and private clients, including the Tejon Ranch Grapevine, Pennsylvania Keystone Rail Corridor, Orlando Regional Medical Center, and the Eustis CRA Master Plan. Leah’s strategic thinking and communication skills allow her to translate and synthesize complex challenges into responsive solutions, while making her a unique asset for consensus and community-building teams.

FEATURED PROJECTS

NORTH VENTURA COORDINATED AREA PLAN | PALO ALTO, CA
Implementing the community engagement strategy in support of the Perkins + Will team. Activities include, advisory group meetings and interactive community workshops and surveys, and a project website.

DOWNTOWN PAVING, SIDEWALK AND UTILITY IMPROVEMENTS | MILL VALLEY, CA
Supporting the project team led by Harris + Associates led to implement outreach activities including stakeholder meetings, advisory committee meetings, pop-up workshops, charrettes, and surveys.

DIRIDON STATION AREA COMMUNITY ENGAGEMENT | SAN JOSE, CA
Assisting the project team in preparing and implementing a community engagement strategy and facilitating meetings and pop-up workshops throughout the city.

STATION AREA PLANNING | SELECT CITIES, PA
While at Glatting Jackson/AECOM, acted as landscape designer and public engagement facilitator for station area plans within Mount Joy, Middletown, and Coatesville, located along Pennsylvania’s Keystone Rail Corridor. Strategized station improvements for maximum community benefit and hosted public charrettes to gather stakeholder input.

CRA MASTER PLAN | CITY OF NEW SMYRNA BEACH, FL
While at Glatting Jackson/AECOM, collaborated on the development of a citizen-driven Community Redevelopment Agency (CRA) Master Plan Update for the 20,000-person town of New Smyrna Beach. Facilitated stakeholder interviews and created the plan’s suite of illustrative graphics.

ADDITIONAL RELEVANT PROJECTS

NEW COMMUNITY VISIONING & ENTITLEMENTS | Tejon Ranch, CA
GROWTH MASTER PLAN | Orlando, FL
DEVELOPMENT STRATEGY | Alameda, CA
LANDSCAPE FRAMEWORKS & DESIGN | Bay Area, CA
SIGNATURE OPEN SPACES | Tianjin, China

EXPERIENCE

PLAN TO PLACE
Outreach Specialist + Urban Designer, 2016 – present

KENKAY ASSOCIATES
Senior Associate Urban Designer, 2012-2016

APRIL PHILIPS DESIGN WORKS
Landscape Architect, 2011 – 2012

GLATTING JACKSON KERCHER ANGLIN - AECOM
Urban Designer & Landscape Architect, 2007-2011

EDUCATION

MASTER OF LANDSCAPE ARCHITECTURE
Highest Honors
University of Florida
Gainesville, FL

LANDSCAPE ARCHITECTURE EXCHANGE STUDENT
Paris Research Center
Paris, France

PRESENTATIONS

Professional Practice Seminar
University of Tennessee, 2015

Landscape Architecture Licensure Prep Workshop, 2010

Florida ASLA Conference – Capstone Presentation, 2007

Analysis and Planning Award of Merit, FLASLA, 2007

SOFTWARE

Adobe InDesign
Adobe Illustrator
Adobe Photoshop
Word
Excel
PowerPoint
# EXCEPTIONS TO THE SCOPE OF WORK

Contractors shall fully describe any exceptions to the written requirements and/or scope, in the space provided below. Attach an additional sheet if more space is necessary. Any exception taken shall be fully described to allow the County of Marin to evaluate its acceptance.

<table>
<thead>
<tr>
<th>Section or Page number</th>
<th>Description of exception</th>
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***END OF EXCEPTIONS***
OFFER

IN COMPLIANCE WITH THE ABOVE, THE UNDERSIGNED OFFERS AND AGREES, IF THIS BID IS ACCEPTED WITHIN SIXTY (60) CALENDAR DAYS FROM DATE OF OPENING, TO FURNISH ANY OR ALL OF THE ITEMS UPON WHICH PRICES ARE QUOTED, AT THE PRICE SET OPPOSITE EACH ITEM, DELIVERED AT THE DESIGNATED POINT WITHIN THE TIME SPECIFIED. DISCOUNTS WILL NOT BE CONSIDERED IN THE EVALUATION OF ANY QUOTATION, UNLESS OTHERWISE STATED IN THIS INVITATION.

REPRESENTATIONS AND CERTIFICATIONS

PROPOSER CERTIFIES THE FOLLOWING

THAT THEY ARE A:

□ Certified Dealer for the Items in this Bid
□ Manufacturer of the Items in this Bid

BUSINESS IS OPERATED AS:

□ AN INDIVIDUAL
□ A PARTNERSHIP
X A CORPORATION

INCORPORATED IN THE
STATE OF California

Company Name: Opticos Design, Inc.
Company Address: 2100 Milvia Street, Suite 125
Berkeley, CA 94704
Company Phone: 510.558.6957
Company Website: www.opticosdesign.com

SIGNATURE OF PERSON AUTHORIZED TO SIGN BID:

[Signature]

PRINTED NAME: Stefan Pellegrini
TITLE: Principal and Vice President
DATE: June 3, 2019
E-MAIL ADDRESS: stefan.pellegrini@opticosdesign.com
ATTACHMENT A

REFERENCES AND PERFORMANCE

Proposers shall provide the following information which will be used by the County in evaluating the proposal. Proposer must provide three former (within the past five years) or present clients for whom these individuals have performed contracting services related to each of the categories for which your firm is offering services.

1. Number of years in business: Nineteen years
2. Current average number of employees: Nineteen employees
3. List 3 Former or Current accounts for contact as reference.

Name: City of San Rafael
Address: 1400 Fifth Avenue, San Rafael, CA 94901
Contact Person: Paul Jensen, Community Development Director
Phone number: 415.485.5064
Project Name: Downtown Precise Plan

Name: County of Kaua‘i
Address: 4444 Rice Street, Suite A473, Lihu‘e, HI 96766
Contact Person: Kaaina Hull, Director
Phone number: 808.241.4050
Project Name: Kaua‘i County Form-Based Planning and Coding

Name: County of Beaufort
Address: PO Drawer 1228, Beaufort, SC 29901
Contact Person: Rob Merchant, Assistant Community Development Director
Phone number: 843.255.2140
Project Name: Beaufort County Multi-jurisdictional LDC and Form-Based Code
DEBARMENT AND SUSPENSION CERTIFICATION

Title 49, Code of Federal Regulations, Part 29

The Contractor, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager:

- is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
- has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years;
- does not have a proposed debarment pending; and
- has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

If there are any exceptions to this certification, insert the exceptions in the following space.

Dated this _______ day of ________, 20____

By ___________________________
Authorized Signature for Contractor

Stefan Pellegrini, Principal and Vice President

Printed Name & Title
NON-COLLUSION AFFIDAVIT
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

State of California
County of _____________________ )
ss.

To the COUNTY of MARIN
DEPARTMENT OF PUBLIC WORKS

Stefan Pellegrini, being first duly sworn, deposes and says that he or she is
Principal and Vice President of Opticos Design, Inc., the party making the foregoing bid that the bid is
not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association,
organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly
or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly
colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone
shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement,
communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any
overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage
against the public body awarding the contract of anyone interested in the proposed contract; that all
statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted
his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative
thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization,
bid depository, or to any member or agent thereof to effectuate a collusive or sham bid."

Note: The above Non-collusion Affidavit is part of the Proposal.

Bidders are cautioned that making a false certification may subject the certifier to criminal prosecution.

Stefan Pellegrini, Principal and Vice President
Printed Name of Document Signer

Signature of Document Signer
REFERENCES AND PERFORMANCE

Proposers shall provide the following information which will be used by the County in evaluating the proposal. Proposer must provide three former (within the past five years) or present clients for whom these individuals have performed contracting services related to each of the categories for which your firm is offering services.

1. Number of years in business: ___14__________
2. Current average number of employees: ___16__________
3. List 3 Former or Current accounts for contact as reference.

Name: Jeremy Tejirian, AICP, Planning Manager – County of Marin
Address: 3501 Civic Center Drive, Suite 308, San Rafael, CA 94903
Contact Person: Jeremy Tejirian
Phone number: (415) 473-3798
Project Name: County of Marin Development Code Amendments

Name: Rodrigo Orduña, Assistant Planning Director – County of Alameda
Address: 224 W. Winton Ave, Suite 111, Hayward, CA 94544
Contact Person: Rodrigo Orduña
Phone number: (510) 670-6503
Project Name: Ashland and Cherryland Business District Specific Plan and Code Update

Name: Damon Golubics, Senior Planner – City of Hayward
Address: 777 B. Street, Hayward, CA 94541
Contact Person: Damon Golubics
Phone number: (510) 583-4210
Project Name: City of Hayward Downtown Specific Plan, Code, and EIR
MBE/WBE PREFERENCE FORM

In order to be eligible as a Minority Business Enterprise (MBE) or Women Business Enterprise (WBE), business is at least 51% owned and controlled by members of the following groups: African American, Hispanic, Native American, Asian-Pacific Islander, Subcontinent Asian American and/or Women.

Applying as: □ MBE □ WBE □ MBE/WBE

Has your firm been certified by another certifying agency? □ Yes □ No If Yes, list agency and certification # if applicable: Disadvantaged Business Enterprise (DBE)-California Unified Certification Program (CUCP) UCP Firm# 40054

Owners Name and Title: Lisa Wise, President Gender Female

Position in Applicant Firm: Owner/President Percent Ownership: 51%

Ownership in Firm Since: 2006 Ethnicity: Caucasian

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Date Appointed</th>
<th>Ethnicity</th>
<th>Gender</th>
<th>Responsibility</th>
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<tr>
<td>Elizabeth (Lisa) Wise</td>
<td>Owner/Treasurer</td>
<td>3/7/2008</td>
<td>Caucasian</td>
<td>Female</td>
<td>President</td>
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<td>Chief Financial Officer/</td>
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<tr>
<td>Henry Pontarelli</td>
<td>Owner/Secretary</td>
<td>3/7/2008</td>
<td>Caucasian</td>
<td>Male</td>
<td>Vice President</td>
</tr>
</tbody>
</table>

Lisa Wise Consulting, Inc. May, 29, 2019

Firm Name

983 Osos Street

Business Address

San Luis Obispo, CA 93401

City, State, Zip Code

805-595-1345

Phone Number

Signature of Authorized Representative lisa@lisawiseconsulting.com

President

Title

E*Mail

Complete Form ONLY if you qualify
DEBARMENT AND SUSPENSION CERTIFICATION

Title 49, Code of Federal Regulations, Part 29

The Contractor, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager:

- is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
- has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years;
- does not have a proposed debarment pending; and
- has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

If there are any exceptions to this certification, insert the exceptions in the following space.

Dated this 29th day of May, 2019

By [Signature]

Authorized Signature for Contractor

Lisa Wise, President

Printed Name & Title
NON-COLLUSION AFFIDAVIT
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

State of California
County of ____________) ss.

To the COUNTY of MARIN
DEPARTMENT OF PUBLIC WORKS

Lisa Wise, being first duly sworn, deposes and says that he or she is
President of Lisa Wise Consulting, the party making the foregoing bid that the bid is
not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association,
organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly
or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly
colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone
shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement,
communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any
overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage
against the public body awarding the contract of anyone interested in the proposed contract; that all
statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted
his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative
thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization,
bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.”

Note: The above Non-collusion Affidavit is part of the Proposal.

Bidders are cautioned that making a false certification may subject the certifier to criminal prosecution.

Lisa Wise
Printed Name of Document Signer

Signature of Document Signer
STATE OF CALIFORNIA
COUNTY OF SAN LUIS OBISPO

On ______________________
before me, ______________________
a Notary Public, personally appeared ______________________

________________________

who proved to me on the basis of satisfactory evidence) to be the person(s) whose name(s) is/are subscribed to the
within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies),
and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s)
acted, executed the instrument.

I certify under Penalty of Perjury under the laws of the State of California that the foregoing paragraph is true and
correct.

________________________
WITNESS my hand and official seal.

________________________
Signature ______________________
Lola L Wingate (805)441-6972
Plan to Place | Signed Forms
ATTACHMENT A

REFERENCES AND PERFORMANCE

Proposers shall provide the following information which will be used by the County in evaluating the proposal. Proposer must provide three former (within the past five years) or present clients for whom these individuals have performed contracting services related to each of the categories for which your firm is offering services.

1. Number of years in business: 3
2. Current average number of employees: 2
3. List 3 Former or Current accounts for contact as reference.

Name: City of San Rafael
Address: 1400 Fifth Avenue, San Rafael, CA 94901
Contact Person: Paul Jensen, Community Development Director
Phone number: 415-485-5064
Project Name: General Plan 10-Year Status Report and Housing Element Update

Name: Town of Corte Madera
Address: 300 Tamalpais Dr., Corte Madera, CA
Contact Person: Adam Wolff, Director of Planning and Building
Phone number: 415-927-5059
Project Name: Tamal Vista Corridor Study

Name: City of Mill Valley
Address: 26 Corte Madera Avenue, Mill Valley, CA 94941
Contact Person: Vincent Smith, former Director of Planning and Building (now in Napa County Planning Dept)
Phone number: 707-259-5934
Project Name: Multi-Family Residential and Mixed-use Design Guidelines and Standards
LOCAL BUSINESS PREFERENCE CERTIFICATION

Chapter 3.10 of the Marin County Code, Preference in Contracts and Purchases, allows a 5% preference on the price submitted to local businesses which Contract with or

All respondents must certify they meet the definition of local business. Please initial one of the following definitions which apply to your business and describe below:

1. _____ has its principal place of business in Marin County; or
   Describe: ________________________________

2. [ ] has a business license issued in Marin County for a period of six months prior to any claim of preference; or
   Describe: BUSINESS LICENSE ISSUED IN SAN ANSELMO, SINCE 2017

3. _____ maintains an office or other facility in Marin in which not less than five persons are employed substantially full time.
   Describe: ________________________________

Pursuant to Marin County Code, Chapter 3.10.40, any business which falsely claims a preference shall be ineligible to bid on county purchases or contracts for a period of one year from the date of discovery of the false certifications.

Upon request, vendor agrees to provide additional information to substantiate this certification. Vendor certifies information provided is true and accurate under penalty of perjury.

Firm Name: __________________________ Date: ________
524 SAN ANSELMO AVE, #114 
SAN ANSELMO, CA 94960

Business Address: __________________________ City, State, Zip Code: ________

Signature of Authorized Representative: __________________________ Phone Number: ________
FOUNDER & PRINCIPAL
dave@planteplant.com

Title: __________________________ E-Mail: ________

Complete Form ONLY if you qualify
DEBARTMENT AND SUSPENSION CERTIFICATION

Title 49, Code of Federal Regulations, Part 29

The Contractor, under penalty of perjury, certifies that, except as noted below, he/she or any other person associated therewith in the capacity of owner, partner, director, officer, and manager:

- is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
- has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past 3 years;
- does not have a proposed debarment pending; and
- has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past 3 years.

If there are any exceptions to this certification, insert the exceptions in the following space.

Dated this 29 day of MAY 2019

By

Authorized Signature for Contractor

DANJEL JAVAD, FOUNDER - PLAN TO PLACE

Printed Name & Title
NON-COLLUSION AFFIDAVIT
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

State of California                    )
County of MARIN                  ss.

To the COUNTY of MARIN
DEPARTMENT OF PUBLIC WORKS

DAVE JAVID, being first duly sworn, deposes and says that he or she is
FOUNDER & PRINCIPAL of PLANTO PLACE the party making the foregoing bid that the bid is
not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association,
organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly
or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly
colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone
shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement,
communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any
overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage
against the public body awarding the contract of anyone interested in the proposed contract; that all
statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted
his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative
thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization,
bid depository, or to any member or agent thereof to effectuate a collusive or sham bid."

Note: The above Non-collusion Affidavit is part of the Proposal.

Bidders are cautioned that making a false certification may subject the certifier to criminal prosecution.

DAVE JAVID
Printed Name of Document Signer

[Signature of Document Signer]