



## Staff Report

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**TO:** Honorable Mayor and Members of the Town Council  
**FROM:** Mary Beth Van Voorhis, Planning Director  
**DATE:** September 8, 2020  
**RE:** General Plan Update - Planning Services Contract

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### **Recommendation**

Adopt Resolution #20-\_\_ awarding a Planning Services Contract for the Town of Loomis General Plan Update including interpretation of plans and regulations, preparation of General Plan updates, CEQA documents, and other matters associated with all aspects of the General Plan Update to Hauge Brueck Associates (HBA) and authorize the Town Manager to execute the agreement, acceptable to the Town, for providing such General Plan Update Services. Services related to the General Plan Update will be billed on an hourly basis and will not exceed \$145,000.

### **Issue Statement and Discussion**

This contract will allow the Town Manager and Planning Department to proceed with the General Plan Update in a timely manner. Having a planning consultant under contract will allow the Town to continue to focus on grant opportunities which will supplement the Town's out-of-pocket expenses related to the General Plan update and facilitate new larger scale projects in a timely manner.

The Planning Department anticipated the need for Planning Services for the General Plan Update and issued a Request for Proposals (RFP) on May 27, 2020. Two consulting firms (PlaceWorks and AECOM) submitted proposals. Town staff reviewed, evaluated and ranked the submittals and after discussing the results, concurred on the recommendation of utilizing both firms' independent strengths to meet the Town's needs for the complete General Plan Update. PlaceWorks will focus on Housing and Land Use Element updates with a CEQA Addendum and AECOM will update the remaining elements settings and environmental analysis.

The HBA portion of the General Plan Update will provide coordination of the General Plan Update Team, compile and analyze data received, prepare Planning Commission and Town Council staff reports, resolutions, ordinances, and conditions of approval, and give oral presentations. HBA will also be present at all workshops and public outreach events. HBA's role in the development of the General Plan Update is as a partnership with the Town and community, acting as a guide in the process, establishing rapport and trust with the larger community, and providing direction on working toward the General Plan Update goals.

As proposed, this contract would not exceed \$145,000 (billed at the firm's current hourly rates). Work under the contract will be coordinated by the Planning Department and Town Manager.

**CEQA Requirements**

None at this time.

**Financial and/or Policy Implications**

Funding for this contract will be from grant funds received with the balance of this contract to be funded with existing general plan update fund balances. This contract does not require a budget amendment as there are adequate funds in the budget to accommodate this expenditure.

**Attachments**

- A. Resolution
- B. Hauge Brueck Associates – Scope of Work

**TOWN OF LOOMIS**

**RESOLUTION NO. 20 - \*\***

**A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF LOOMIS AWARDDING A PLANNING SERVICES CONTRACT FOR THE GENERAL PLAN UPDATE TO HAUGE BRUECK ASSOCIATES AND AUTHORIZE THE TOWN MANAGER TO EXECUTE AN AGREEMENT ACCEPTABLE TO THE TOWN FOR PROVIDING SUCH SERVICES.**

**WHEREAS**, the Town of Loomis, anticipates the need for Planning Department support services for the General Plan Update; and

**WHEREAS**, a consulting firm will provide a multitude of resources that include interpretation of existing Town regulations, General Plan consistency updates, Environmental documents, public outreach, and other related duties as needed; and

**WHEREAS**, this proposal was received and reviewed for consistency with the Request for Proposals (RFP) and the needs of the Town of Loomis to provide General Plan Update services.

**NOW, THEREFORE, IT IS HEREBY RESOLVED** that the Town Council of the Town of Loomis accepts the proposal of Hauge Brueck Associates and hereby authorizes the Town Manager to execute agreements acceptable to the Town for General Plan Update with Environmental Impact Report planning services.

**PASSED AND ADOPTED** this 8<sup>th</sup> day of September, 2020 by the following roll call vote:

AYES:  
NOES:  
ABSENT:  
ABSTAINED:

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Jan Clark-Crets, Mayor

ATTEST:

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Charleen Strock, Town Clerk

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# 1 COMPANY PROFILE

HBA is a multidisciplinary planning and environmental firm that provides services related to planning, environmental impact assessment, and permitting through its staff and project-specific subcontractor teams. HBA is a limited liability company formed in 2006, and at present, includes two partners, Anders Hauge and Rob Brueck, and three part-time/casual hourly employees. HBA maintains offices in Sacramento, South Lake Tahoe, And Meadow Vista, California at the following locations:

Sacramento (Main Office)  
2233 Watt Ave., Suite 300  
Sacramento, CA 95825

Meadow Vista  
2460 Walgra Meadows Circle  
Meadow Vista, CA 95722

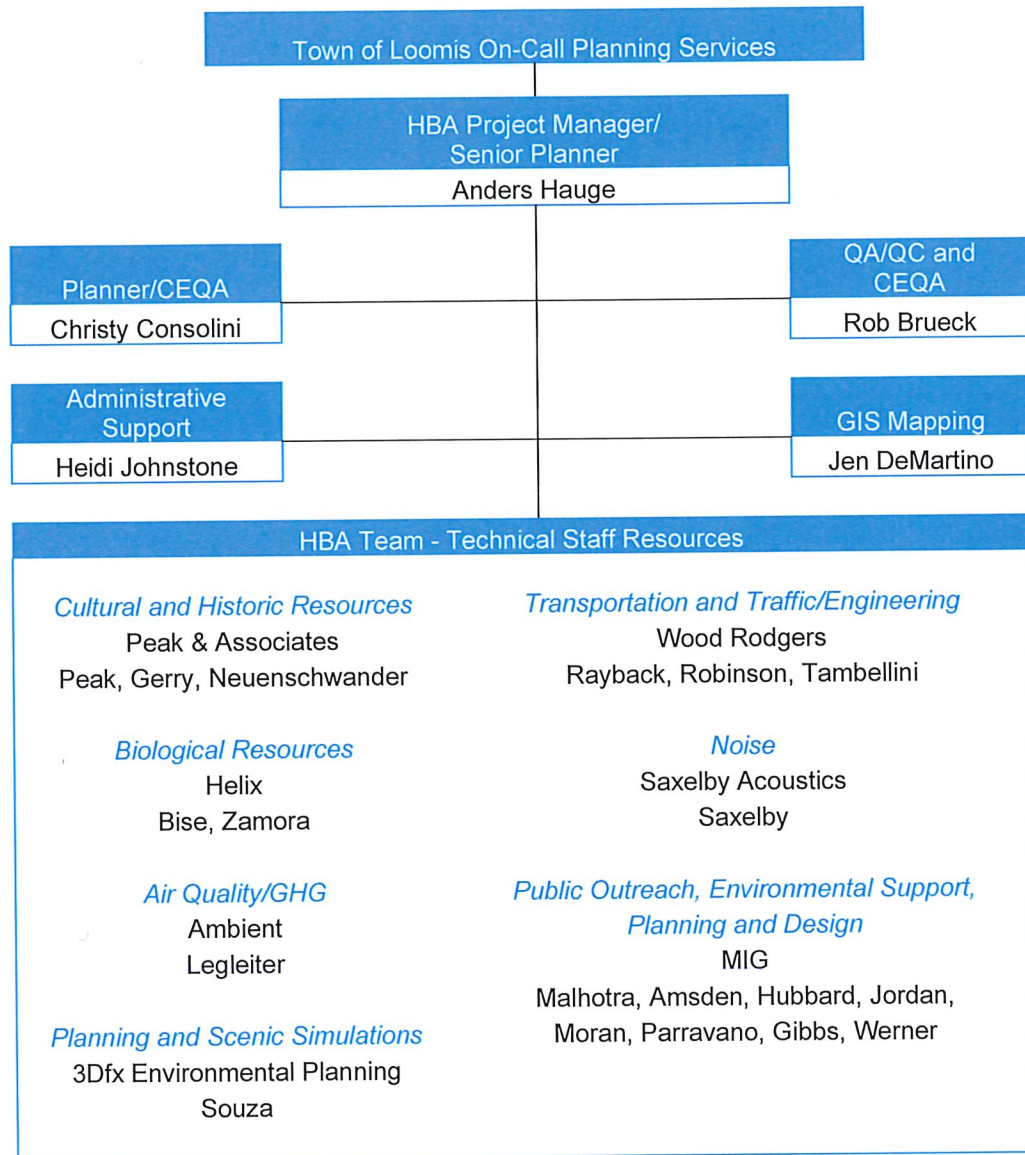
South Lake Tahoe  
901 Merced Avenue  
South Lake Tahoe, CA 96150

HBA's manager and key point of contact for the work is Anders Hauge with assistance from Christy Consolini.

## 2 ORGANIZATION AND STAFFING

HBA's staff and their assignments are presented below.

### HBA Team Organization Chart



### **3 SCOPE OF SERVICES**

The Town of Loomis requires planning assistance on the preparation of the Town of Loomis General Plan Update. Work will include close working relationships with Town planning staff and the staff of other Town departments, jurisdictions, agencies, and the public; providing CEQA analysis and data compilation and analysis; meeting with the community and agencies to discuss and review recommendations; and presenting information to the Town Council and Planning Commission and providing planning direction and meeting materials. The work is to be conducted in a timely and concise manner.

#### **Project Management**

HBA will maintain the program schedule, time records, and fiscal accounting and submit monthly progress reports to the Town through the contract term. The progress reports will provide a description of the work completed during the invoice period, a discussion of the work anticipated in the next billing period, and a description of potential issues with a corresponding resolution of each issue.

HBA will prepare a monthly General Plan Update status report to be provided to the Town Council and Planning Commission.

Data and deliverables will be accessible to the Town via BOX.com, a cloud based collaborative site. Administrative drafts of documents will be made available to the Town for review and comment. Box.com tracks each version of a document and each individual that accesses the document, providing the Town with the ability to track the status of deliverables as they are prepared.

#### **General Plan Services**

Based on direction received from the Town, HBA will provide General Plan services including interpretation of plans and regulations, preparation of General Plan updates, CEQA documents, and other subjects requested by the Town. Specifically, HBA will:

- Coordinate the General Plan Team throughout the process of updating the General Plan.
- Coordinate with and develop good working relationships with Town departments and staff, neighboring jurisdictions such as Placer County and the cities of Rocklin and Roseville, area districts, and the public.
- Compile and analyze data on economic, social, environmental, and physical factors affecting land use.
- Write Planning Commission and Town Council staff reports, resolutions, ordinances, and conditions of approval, and give oral presentations.
- Attend public hearings and community meetings.
- Update the Town's General Plan, including review of the existing General Plan content, updating for compliance with current State law and general plan requirements, environmental review, and specialized data development. HBA will coordinate the consultants retained by the Town to prepare specific sections of the General Plan Update and General Plan CEQA documents, and will provide initial review of submittals. HBA will coordinate the Community Education, Outreach and Meetings. HBA will prepare the

Public Facilities and Services Element and the Social Justice Element. HBA will review the documents prepared for the Town and included in the General Plan and CEQA documents.

## **1. General Plan Update**

HBA's philosophy is that the general plan is a community's legacy and must reflect the vision and desires of its citizens, workers, and property owners. Our role is to assist the community in articulating the vision and identifying policies and measures to implement that vision, thereby meeting local needs as well as the parameters of state law. Our approach includes the following:

- Integration of expertise in planning, environmental law, sciences, and public participation;
- Articulation of a clear, realistic vision for the future;
- A focus on key issues and an emphasis on local needs and desires;
- Use of a strategic planning approach to the development of policy alternatives;
- Support of implementation through clear and achievable measures with identified funding;
- A "self-mitigating" plan that integrates implementation and environmental mitigation;
- A user-friendly, highly readable document;
- Consistency of the plan with legal requirements;
- A strong on-site presence during the planning process; and
- Working as a single team with local staff and subconsultants.

Our general plan update process includes the following steps that characterize our approach:

- Identification of key issues through a public scoping process;
- Interviewing key decision makers and community stakeholders to further define issues;
- Identification of data to support the update and evaluation of the Town's current database;
- Articulation of principles that will guide the consideration of new or modified policies;
- Evaluation of the efficacy of current general plan policies and implementation programs;
- Development of policy alternatives based on principles and evaluation;
- Identification of thresholds of significance to define needed mitigation; and
- Preparation of an implementation program that also provides a mitigation monitoring program.

Our role in the development of the general plan update is as a partnership with the Town and community, acting as a guide in the process, establishing rapport and trust with the larger community, and providing advice on working toward the update goals.

### **Attendance at Meetings**

HBA is available to attend meetings arranged by the Town. Our clients have found HBA to be responsive. When necessary, we meet during evenings or weekends for time sensitive projects. We provide access to HBA's conference center, a web based conferencing site that works with telephones or computers. For quick meetings when individuals cannot attend in person, this software works well.



## 2. Schedule Compliance

Tools HBA uses to adhere to our schedules include:

**Schedule Management.** Use a Microsoft Project compatible program to track each task, deliverable, and milestone. These will be adjusted with Town concurrence to reflect changes in the scope and/or schedule. Regular review of the schedule keeps participants informed of upcoming deliverables and meetings and the consequences of schedule change.

**Scope Management.** Project Manager tracks deliverables to assure the team performs within the agreed upon scope and schedule.

**Progress Reports.** Issue monthly progress reports to inform the Town and applicant of the status of the scope, schedule, and budget. The progress report describes activities accomplished during the month and identifies tasks to be completed within the next month. The Project Manager identifies issues and recommended resolutions. The progress report will be discussed monthly between the Town and HBA to assure both understand the progress and issues encountered in the process.

## 3. Communications

HBA establishes lines of communication with the Town staff and project applicants at the beginning of each project. Our Communication Guidelines are used to direct the flow of communications, especially with the press and public. The principals established in the communications guidelines are:

**Be Accurate.** Use facts and if necessary, clearly stated experienced professional assumptions. The use of facts assures that discussions are focused on issues and not unfounded judgments. The best experts in their field need to be engaged in the process.

**Be Objective.** Throughout the process, objectivity must be achieved. Opportunities for solutions often develop if an objective/open minded approach is maintained. CEQA/NEPA documents require objective information and analysis, or the environmental document is at risk of not meeting legal standards.

**Provide Disclosure.** Disclosure throughout the process is essential to assure that each participant is conducting discussions with the same information and knowledge. Disclosure builds trust in the information used in decision-making.

**Balance the Level of Detail.** It is important to determine the level of detail required for an environmental document early in the review process. Greater detail would reduce any required subsequent documentation, but a longer schedule increases risks that the project or related circumstances would change, and additional evaluation would be required.

HBA uses Box.com to collaborate the production and review of documents with our clients. Box tracks each version and author, provides access to the documents through the Internet, and assures consistency in review. HBA also has the skills to create, design, and manage project websites to facilitate public communications, as well as prepare and produce effective public outreach materials.

Our success in communication with staff, decision makers, stakeholders, and the public have been demonstrated in our performance on large-scale or controversial projects conducted for the Town

of Loomis, City of Redwood City, County of Mariposa, TRPA, Town of Moraga, City of Sutter Creek, City of Susanville, Southern Nevada Water Authority, and City of San Joaquin.

## **4 SUBCONTRACTORS**

HBA utilizes subcontractors to provide technical support for specific environmental topics such as traffic and circulation, noise, biological resources, and cultural resources. With the exception of Wood Rogers who is contracted directly through the Town, the following subcontractors are contracted under HBA to provide community education and engagement, the General Plan settings update, and the policy evaluation. They will also update the Elements and provide General Plan CEQA documentation on their respective topics under contract to AECOM with HBA oversight.

- Saxelby Acoustics, Noise
- Peak & Associates, Historic and Cultural Resources
- Helix, Biological Resources
- Wood Rodgers, Traffic/Transportation and Engineering

These additional subcontractors are available if needed to provide supplemental support.

- MIG, Public Outreach, Planning and Design, and Biological Resources
- AMBIENT, Air Quality and Greenhouse Gas Emissions
- 3DFX Environmental Planning, Planning and Visual Simulations

## 5 COST PROPOSAL

HBA estimates a reasonable maximum fee for the General Plan update is \$145,000. Note, initial development of the General Plan Update was performed and invoiced using the HBA On-Call contract. HBA's and our Team's Rate Schedules are provided on the following page.

Hauge Brueck Associates LLC

### TASK ORDER 1 - GENERAL PLAN UPDATE

General Plan Estimated Hours and Fees											
	HBA LABOR					OTHER DIRECT COSTS					TOTAL
	Associate XI	Associate VIII	Associate III	Hours	Subtotal Labor	HBA ODC's	Helix	Peak	Saxelby	Subtotal ODC	
	Hauge Brueck	Consolini	Johnstone								
Community Education, Engagement & Meeting Settings	200	200	24	424	\$65,584	\$733	\$7,640	\$1,040	\$1,750	\$11,163	\$76,700
Policy Evaluation	8	40		48	\$6,784		\$6,020	\$6,880	\$6,829	\$19,729	\$26,500
Elements	10	40		50	\$7,160		\$2,100	\$1,040	\$2,800	\$5,940	\$13,100
EIR	20	80		100	\$14,320						\$14,300
	20	80		100	\$14,320						\$14,300
											\$0
Labor Rate	\$188	\$132	\$66								
Total Hours	258	440	24								
General Plan Total	\$48,504	\$58,080	\$1,584	722	\$108,168	\$733	\$15,760	\$8,960	\$11,379	\$36,832	\$145,000

# HAUGE BRUECK A S S O C I A T E S

## 2020 RATE SCHEDULE

CLASSIFICATION	HOURLY BILLING RATE
ASSOCIATE I	\$38
ASSOCIATE II	\$47
ASSOCIATE III (Johnstone)	\$66
ASSOCIATE IV	\$75
ASSOCIATE V	\$94
ASSOCIATE VI (DeMartino)	\$104
ASSOCIATE VII	\$113
ASSOCIATE VIII (Consolini)	\$132
ASSOCIATE IX	\$150
ASSOCIATE X	\$169
ASSOCIATE XI (Hauge, Brueck)	\$188
ASSOCIATE XII	\$207

(Updated Annually)

Hourly billing rates include labor and overhead (e.g., office space, office supplies, computers, phones, and incidentals).

Mileage billed at IRS rates.

Other direct costs (ODC) billed at actual cost plus 10% (e.g., printing, travel and subcontractors).



## Billing Rates

Professional time is billed according to the rates presented below.

Team Member and Title	Hourly Billing Rate
Mukul Malhotra, Principal / Director of Urban Design	\$295
Dan Amsden, AICP, Director / Senior Planner and Urban Designer	\$175
Kelsey Hubbard, Planner and Urban Designer	\$105
Jamillah Jordan, Community Engagement Specialist	\$150
Laura Moran, Principal, Ecological Restoration	\$225
Amy Parravano, Director of Biological Services	\$185
Michelle Gibbs, Senior Environmental Project Manager	\$170
Kate Werner, Senior Environmental Project Manager	\$180
Planning and Urban Design Associate	\$110
Community Engagement Associate	\$115
Environmental Associate	\$115
Administrator	\$145

## AMBIENT AIR QUALITY AND NOISE CONSULTING

### FEE SCHEDULE

#### Rate/Hour

Kurt Legleiter, Principal..... \$150

Project Services/Tasks: Air Quality, Greenhouse Gas, Noise & Groundborne  
Vibration Assessments

#### General Terms

1. Scheduled rates are effective for services contracted through December 2019.
2. Scheduled labor rate includes direct and indirect costs. Outside consultants and subcontractors, if applicable, will be billed at actual cost plus a 10 percent administrative fee, with prior approval from the client.

**SAXELBY ACOUSTICS**  
**2019 FEE SCHEDULE AND CONSULTING TERMS**

Item	Rate
<b>Principal Consultant</b> <i>Regular Rate</i> <i>Legal Rate (Depositions, court testimony, etc.)</i>	 \$150/hr. \$300/hr.
<b>Technical Staff</b>	\$100/hr.
<b>Administrative Staff</b>	\$75/hr.
<b>Mileage Rate</b>	IRS Rate (\$0.58/mile)
<b>Meals and Lodging</b>	\$200/day
<b>Sound Level Meter</b> <i>Basic (daily)</i> <i>Basic (weekly)</i> <i>Advanced (daily)</i> <i>Advanced (weekly)</i>	 \$100/day \$300/week \$150/day \$500/week

**PEAK & ASSOCIATES, INC.**  
Standard Billing Rates Effective February 1, 2019

<b><u>Professional Classification</u></b>	<b><u>Hourly Rate</u></b>
Principal Investigator	\$130.00
Archeologist/Historian IV	120.00
Archeologist/Historian III	80.00
Archeologist/Historian II	65.00
Archeologist/Historian I	50.00
<b>Other Direct Charge Rates</b>	
Automobile mileage	\$0.55/mile

**Cost Reimbursement Charges:** Travel costs are based on direct reimbursements for commercial transportation, including vehicle rentals. Per diem is charged at the government rate for the region.

**3Dfx Environmental Planning**  
**2019 Fee Schedule**

	<b><u>Rate/Hour</u></b>
Aaron Souza, Principal .....	\$100





**SACRAMENTO FEE SCHEDULE**  
Effective January 1, 2019

<b>CLASSIFICATION</b>	<b>STANDARD RATE</b>
Principal Engineer/Geologist/Surveyor/Planner/GIS/LA* II	\$245
Principal Engineer/Geologist/Surveyor/Planner/GIS/LA* I	\$215
Associate Engineer/Geologist/Surveyor/Planner/GIS/LA* III	\$200
Associate Engineer/Geologist/Surveyor/Planner/GIS/LA* II	\$190
Associate Engineer/Geologist/Surveyor/Planner/GIS/LA* I	\$180
Engineer/Geologist/Surveyor/Planner/GIS/LA* III	\$170
Engineer/Geologist/Surveyor/Planner/GIS/LA* II	\$160
Engineer/Geologist/Surveyor/Planner/GIS/LA* I	\$145
Assistant Engineer/Geologist/Surveyor/Planner/GIS/LA*	\$110
CAD Technician III	\$145
CAD Technician II	\$125
CAD Technician I	\$110
Project Coordinator	\$125
Administrative Assistant	\$105
1 Person Survey Crew	\$195
2 Person Survey Crew	\$285
3 Person Survey Crew	\$370
Consultants, Outside Services, Materials & Direct Charges	Cost Plus 10%
Overtime Work	Rate Plus 50%

\*LA = Landscape Architect

Blueprints, reproductions, and outside graphic services will be charged at vendor invoice. Auto mileage will be charged at the IRS standard rate, currently 58 cents per mile.

Fee Schedule subject to change January 1, 2020.



**EXHIBIT B**  
**SCHEDULE OF FEES**



**CONSULTING SERVICES**

Consulting services performed by HELIX typically include, but are not necessarily limited to, office, field, meetings, hearings and travel time. Consulting services for expert witness review, deposition, and/or testimony will be provided at one and one-half times our professional rates.

**DIRECT COSTS**

Certain identifiable direct costs will be charged to the project at cost plus ten percent. Examples of direct costs include subconsultants, vehicle or equipment rentals, airplane and train fares, parking, per diem and lodging, mileage, communications, reproduction, and supplies. A 4-wheel drive premium will be charged at \$25 per project day. There will be additional charges for plotting, color printing, aerial photographs and GPS services.

**PAYMENT**

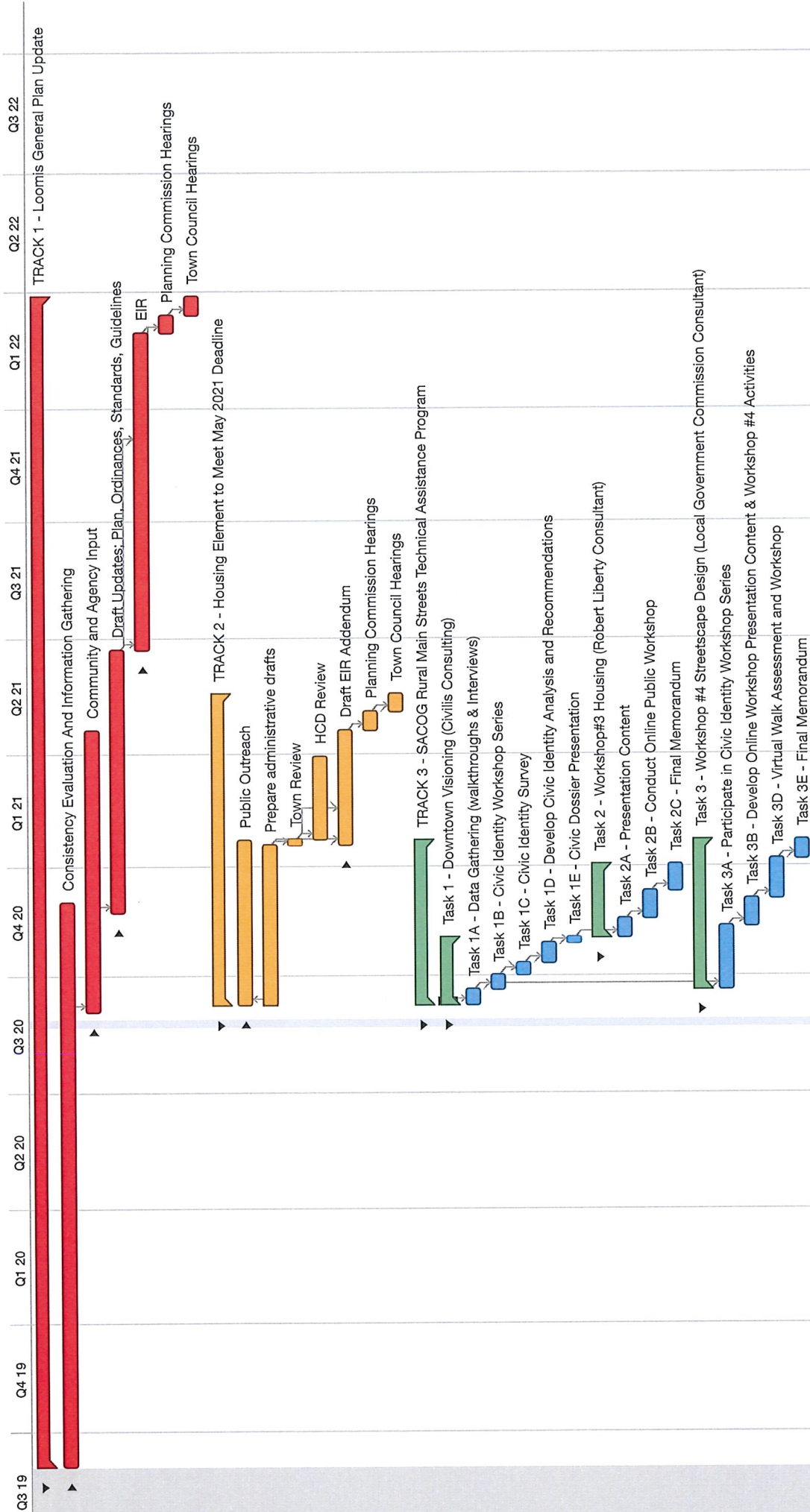
Invoices will be submitted monthly. Payment on invoices is due within thirty days of receipt. If payment is not paid when due, then such sum shall bear interest at 1 1/2 % per month on the unpaid balance, not to exceed the maximum legal rate of interest.

**PROFESSIONAL RATES**

Current hourly rates for consulting services:

Principal	\$210-230
Principal Acoustician	\$180-200
Principal Biologist	\$190-220
Principal Landscape Architect	\$160-180
Principal Permitting Specialist	\$170-220
Principal Planner	\$195-230
Principal Regulatory Specialist	\$185-220
Senior Project Manager I-III	\$150-215
Senior Air Quality Specialist	\$155-180
Senior Environmental Specialist	\$130-170
Senior Fisheries Scientist	\$200-230
Noise/Air Quality Specialist	\$115-145
Environmental Specialist I-III	\$85-125
Environmental Compliance Analyst	\$70
Environmental Compliance Specialist	\$115
Project Manager I-III	\$120-150
Assistant Project Manager	\$100-120
Archaeology Field Director	\$105
Staff Archaeologist	\$75-115
Senior Archaeologist	\$120-165
Historian	\$70-125
Environmental Planner I-III	\$95-120
Environmental Analyst	\$65-75
Landscape Architect	\$110-125
Senior Landscape Architect	\$130-150
Landscape Planner I-III	\$95-115
Sr. Scientist	\$130-180
Biologist I-V	\$80-130
Assistant Biologist	\$60
Senior GIS Specialist	\$125-165
GIS Specialist I-III	\$75-120
Graphics	\$115
Technical Editor	\$70-100
Operations Manager	\$105-115
Word Processor I-III	\$65-85
Clerical	\$65-75

*Rates are subject to change on a yearly basis*



		HBA	Helix	Peak	Saxelby		Wood Rogers	SACOG	AECOM	Placeworks		TOTAL
TASKS	HBA Contract					Town of Loomis Contracts						
		Introduction, Community Outreach, Public Facilities, Services, Social Justice	Biological	Cultural	Noise	Subtotal	Circulation	Rural Main Street Program	Air Quality, Greenhouse Gas, Energy, Economic Development, Public Health and Safety, Program EIR	Housing, Land Use, Outreach, EIR Addendum	Subtotal	
1	Community Education, Engagement & Meetings	\$ 66,400	\$ 7,640	\$ 1,040	\$ 1,750	\$ 76,830	\$ 8,000		\$ 51,290	\$ 45,010	\$ 104,300	\$ 181,130
2	General Plan Elements	\$ 28,201	\$ 8,120	\$ 7,920	\$ 9,629	\$ 53,870	\$ 26,000	\$ 40,000	\$ 89,410	\$ 100,650	\$ 256,060	\$ 309,930
3	CEQA (Housing Addendum & GP Program EIR)	\$ 14,300	\$ -	\$ -	\$ -	\$ 14,300	\$ -	\$ -	\$ 237,695	\$ 17,410	\$ 255,105	\$ 269,405
4	Other Direct Costs	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ -	\$ 90,140	\$ 3,375	\$ 93,515	\$ 93,515
Total		\$ 108,901	\$ 15,760	\$ 8,960	\$ 11,379	\$ 145,000	\$ 34,000	\$ 40,000	\$ 468,535	\$ 166,445	\$ 708,980	\$ 853,980

General Fund - General Plan	\$ 700,000
SB 2 Grant Funds	\$ 165,000
Leap Grant Funds	\$ 65,000
Reap Grant Funds	\$ 10,000
Rural Main Street - Grant Funds	\$ 20,000
<b>Total</b>	<b>\$ 960,000</b>
Total Contracts (as approved above)	
General Plan Fund Expenditures 9/30/19 through 7/31/2020	\$(853,980)
	\$ (24,212)
<b>Estimated Fund Balance</b>	<b>\$ 111,808</b>