

CONSENT CALENDAR

SUBJECT: AWARD OF CONTRACT - HOUSING ELEMENT AND FIVE YEAR CONSOLIDATED PLAN UPDATE

SOURCE: COMMUNITY DEVELOPMENT DEPARTMENT



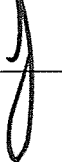
COMMENT: On June 3, 2014, the City Council authorized staff to distribute a Request for Proposals (RFP) to update the Housing Element and Five Year Consolidated Plan. The services to be rendered under this contract would include, but not be limited to, the preparation of the Housing Element and Five Year Consolidated Plan. Key components of this effort would include:

- Collect data related to housing affordability and needs;
- Develop, implement, and analyze results of a public participation survey, as well as hold community meetings to involve stakeholders and the public in the process;
- Prepare an Analysis of Impediments and Needs Assessment, which will be incorporated into the Consolidated Plan;

The consultant would also serve as the primary contact with the California Department of Housing and Community Development (HCD) in working through the approval process.

The RFP requested a fixed cost for the above mentioned tasks and then a comprehensive fee schedule for all personnel, equipment and indirect costs related to additional services that may be required. At the time that staff initially requested authority to distribute the RFP, the fixed cost was estimated to be approximately \$75,000 based on previous years' consolidated plan updates. However, staff failed to evaluate the fees associated with the Housing Element update as that was not included with the previous Consolidated Plan. Both proposals received exceeded the originally estimated amount. It is important to note that the General Fund is the funding source for this effort, which was approved in the 2014/2015 Annual Budget, in an amount of \$150,000 which will cover the full cost of the consultant's proposal as well as administrative costs.

On July 9, 2014, staff interviewed both of the firms that submitted proposals. Based on the qualifications, experience, and unique perspective of the firm, staff recommends contracting with LeSar Development Consultants. The proposal amount is \$94,125.

D.D.  Appropriated/Funded  C.M. 

Item No. 9

RECOMMENDATION:

That City Council:

1. Award the Housing Element and Five Year Consolidated Plan Update to LeSar Development Consultants; and
2. Authorize the Mayor to sign contract documents.

ATTACHMENT:

Professional Services Agreement

PROFESSIONAL SERVICES AGREEMENT
Preparation of the Five Year Consolidated Plan and
Updating of the City of Porterville's Housing Element

DATE: August 6, 2014

PARTIES: City of Porterville, a California municipal corporation, hereinafter referred to as "CITY"; and LeSar Development Consultants, hereinafter referred to as "CONSULTANT".

RECITALS: The CITY's requirement to update the Housing Element and prepare the 2015-2020 Consolidated Plan for the City of Porterville by September 30, 2015, has resulted in contracting with a CONSULTANT to lead this project. Said project will hereinafter be referred to as "project" is described as follows:

Project Name: 2015-2020 Consolidated Plan, and City of Porterville Housing Element Update.

Description of Project: Development and preparation of 2015-2020 Consolidated Plan, Annual Action Plan, Analysis of Impediments to Fair Housing Choice, and Housing Element Update as detailed in Exhibit A. Lead the effort, assisted by City staff, in preparing the required update to the Housing Element which is to be certified by the Department of Housing and Community Development (HCD) by September 30, 2015. Preparing the Five Year Consolidated Plan in HUD's eCon Suite in IDIS.

AGREEMENTS:

IN CONSIDERATION OF MUTUAL COVENANTS AND AGREEMENTS HEREINAFTER set forth, the parties hereto do contract and agree as follows:

SECTION 1. CONTRACT SERVICES: CONSULTANT hereby agrees to provide services and materials as defined in Exhibit A, Proposal for Developing and Preparing the 2015-2020 Consolidated Plan and Updating the City of Porterville's Housing Element, as provided by CONSULTANT in connection with the above-described project.

SECTION 2. CONTRACT SERVICES: In consideration for services and materials, CITY shall pay CONSULTANT on a monthly basis the percentage of work completed and as detailed in Exhibit B (specifically, Professional Fee Schedule, effective August 2014). Direct costs such as travel, postage, printing, etc. are all-inclusive in the Professional Fee Schedule. In the event the contract is extended for any period of time, the cost for services must be agreed upon by both parties.

TIME OF PAYMENT: Progress payment requests shall be itemized, identify the project

budget, budget balance and shall reference the completion of tasks associated with the billable hours, and must be submitted by the 25th of each month. CONSULTANT should receive payment within 30 days of the date the bill is received.

SECTION 3. COMPLETION DATE: The services to be performed by CONSULTANT will be commenced upon execution of this contract and all work directives shall be completed in a timely manner. This contract will be in effect for seventeen months from August 6, 2014, in order to provide for the timely completion of all tasks defined in Exhibit A. This contract can be extended after the expiration date, upon mutual agreement by both parties.

CONSULTANT shall not be responsible for delays which are due to causes beyond the CONSULTANT'S reasonable control. In the case of any such delay, the time of completion shall be extended accordingly in writing signed by both parties.

SECTION 4. FAMILIARITY WITH PROJECT: CONSULTANT agrees that it will rely on its own findings and research to perform the services required under this agreement and will not rely solely upon opinions or representations of CITY unless CITY is the only available source of said information. CONSULTANT shall become familiar enough with project details to independently perform its services in conformance with the normal standard of care for such projects.

SECTION 5. INDEPENDENT CONTRACTOR: It is expressly understood that CONSULTANT is entering into this contract and will provide all services and materials required hereunder as an independent contractor and not as an employee of CITY. CONSULTANT specifically warrants that it will have in full force and effect, valid insurance covering:

- (i) Full liability under worker's compensation laws of the State of California; and
- (ii) Bodily injury and property damage insurance in an amount not less than One Million Dollars (\$1,000,000) per occurrence; and
- (iii) Automotive liability in an amount not less than One Million Dollars (\$1,000,000) per occurrence; fully protecting CITY, its elected and appointed officers, employees, agents and assigns, against all claims arising from the negligence of CONSULTANT and any injuries to third parties, including employees of CITY and CONSULTANT. CONSULTANT agrees to indemnify, defend (at CITY'S election), and hold harmless the CITY against any claims, actions or demands against CITY, and against any damages, liabilities for personal injury or death or for loss or damage to property, or any of them arising out of negligence of CONSULTANT or any of its employees or agents.
- (iv) Errors and Omissions insurance of One Million Dollars (\$1,000,000) minimum per claim and aggregate. If deductible for Errors and Omissions insurance is Fifty Thousand Dollars (\$50,000) or more, the City may require a Surety Bond for the deductible.

As an independent contractor, the consultant will obtain and maintain an active City business license.

SECTION 6. WORKMANSHIP AND MATERIALS: Every part of the work herein described shall be executed in a professional manner with competent, experienced personnel. Finished or unfinished material prepared under the agreement, prepared by CONSULTANT, shall become property of CITY.

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

CONSULTANT hereby warrants that any materials prepared under this agreement shall be fit for the intended use contemplated by the parties.

SECTION 7. ASSIGNMENT OF CONTRACT: It is acknowledged by the parties that CITY has entered into this contract with the express understanding that all work will be performed by CONSULTANT or CITY approved sub-consultant. CONSULTANT shall not, without the written consent of CITY, assign, transfer or sublet any portion or part of this work, nor assign any payments to others. Further, the principals involved and identified in the proposal are integral to the performance of the scope of services and shall not change or be replaced without first obtaining prior written approval from the City of a replacement(s) in the completion of the work effort. All sub-consultants shall be approved by the City, prior to commencement of work on any project.

SECTION 8. AFFIRMATIVE ACTION. CONSULTANT will not discriminate against any employee or applicant for employment because of race, color, religion, gender, marital status, or national origin.

SECTION 9. CONFLICT OF INTEREST CODE: CONSULTANT agrees to comply with the regulations of CITY'S Conflict of Interest Code. Said code is in accordance with the requirements of the Political Reform Act of 1974. The CONSULTANT shall sign and file a City of Porterville Consultant Conflict of Interest Questionnaire with the City Clerk.

CONSULTANT covenants that it presently has no interest, and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of service required hereunder. The term "conflict" shall include, as a minimum, the

definition of a "conflict of interest" under the California Fair Political Practices Act and the City of Porterville Conflict of Interest Code, as that term is applied to consultants.

SECTION 10. TERMINATION: This contract may be terminated by either party for just cause by giving thirty (30) days written notice by either party except that City may cancel contract upon five (5) days written notice in the event of nonperformance by Contractor. Nonperformance by the contractor or repeated lack of response or attention to responsibilities and/or directions and requests of City shall be considered adequate cause for termination of contract and/or withholding of funds to contractor which City must pay to third party or parties to correct deficiencies due to lack of performance as determined by City. Upon termination by CITY, CITY shall be relieved of any obligation to pay for work not completed. CONSULTANT may be entitled to just and equitable compensation for satisfactory work completed.

SECTION 11. ENTIRE CONTRACT: It is understood and agreed that this Service Agreement represents the entire Agreement between the parties. Should it be necessary to institute legal proceedings to enforce any and all of the covenants and conditions of this Agreement, the prevailing party shall be entitled to recover attorney's fees and costs.

SECTION 12. DISPUTES; VENUE: If either party initiates an action to enforce the terms hereof or declare rights hereunder, the parties agree that the venue thereof shall be the County of Tulare, State of California. CONSULTANT hereby waives any rights it might have to remove any such action pursuant to California Code of Civil Procedure Section 394.

In an effort to resolve any conflicts that arise during or following completion of the Contract, the CITY and the CONSULTANT agree that all disputes between them arising out of or relating to this Agreement shall be submitted to nonbinding mediation unless the parties mutually agree otherwise.

IN WITNESS WHEREOF, the parties have executed this Service Agreement on the date and year first above written.

CITY OF PORTERVILLE

CONSULTANT

LeSar Development Consultants
2410 First Avenue, San Diego, CA 92101
(619) 236-0612 FAX (619) 236-0613

By _____
Milt Stowe, Mayor

By _____
Agency Representative

Date _____

Date _____

Attachments:

Exhibit "A": Scope of Work

Exhibit "B": Project Fees (see Sample "Fee Schedule")



2410 First Avenue
San Diego, CA 92101
619-236-0612
619-236-0613 FAX
www.LeSarDevelopment.com

**Response to City of Porterville
Request for Proposals**

**Development and Preparation of:
2015 – 2020 Consolidated Plan, Annual Action Plan,
Analysis of Impediments to Fair Housing Choice,
and Housing Element**

RFP #13/14CP1817

**Submitted by
LeSar Development Consultants**

**Contact: Jennifer LeSar, President and CEO
2410 First Avenue
San Diego, CA 92101
619-236-0612 x 101
619-236-0612 fax
jennifer@lesardevelopment.com**

Community Development Department
ATTN: Lupe Diaz
City of Porterville
291 N. Main Street
Porterville, CA 93257

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Response to City of Porterville RFP for the Preparation of 5-Year Consolidated Plan and Housing Element

LeSar Development Consultants (LDC) is pleased to submit this proposal to assist the City of Porterville with the preparation of a Five-Year Consolidated Plan for 2015 – 2020 (Consolidated Plan), 2015 Action Plan (Action Plan), Citizen Participation Plan, Analysis of Impediments to Fair Housing Choice (Analysis of Impediments), and Housing Element.

In developing the Consolidated Plan and other deliverables, we will combine expert analysis of existing data and trends with thoughtful participation of key stakeholders and meaningful engagement of the public to drive a plan that is SMART – specific, measurable, attainable, realistic and time-framed.

Our staff possesses the knowledge, skill, and capacity necessary to provide the consulting services described within the RFP. LDC has expertise in consolidated planning processes, affordable housing programs, development and finance, HUD policies and programs, community outreach and engagement, homelessness mitigation, and economic development strategies, with extensive experience in strategic planning and the creation of action plans. LDC is currently engaged in many of these activities for other clients, including the City of Visalia.

We believe our team is uniquely qualified to provide the services requested due to the following:

- 1) The depth of our knowledge of HUD programs and grants and local housing and community development resources, inclusive of our leadership roles and decades of staff experience within the affordable housing and community development sectors in Central and Southern California;
- 2) Our expertise and successful track record in the development of meaningful public participation processes and in crafting Consolidated Plans, strategic plans, action plans, and performance reports; and,
- 3) Our government expertise, which is enhanced by our network of high-level state-wide relationships in the affordable housing, public and private financing, and government sectors.

Vicky Joes, Director of Housing Policy and Programs, will serve as the Project Manager and primary contact for this scope of services. She can be reached by phone at 619-236-0612 or at vicky@lesardevelopment.com. Thank you for your consideration of our proposal. We look forward to the opportunity to work with the City of Porterville.

Sincerely,

A handwritten signature in cursive script that reads 'Jennifer LeSar'.

Jennifer LeSar
President and CEO, LeSar Development Consultants, Federal Tax ID #20-3468767
2410 1st Ave
San Diego, CA 92101
(619) 236-0612 x101

ITEM A1: GENERAL INFORMATION

Firm Name: LeSar Development Consultants

Address: 2410 1st Ave, San Diego, CA, 92101

Telephone Number: (619) 236-0612 x 102

Fax Number: (619) 236-0613

Project/Contract Representative: Vicky Joes, Principal and Director of Housing Policy and Programs

Representative Email: vicky@lesardevelopment.com

Type of Organization: S Corporation (certified SWBE and SBE)

Surety and Proof of Insurance Information: Please see Appendix A

References: Please see next page

ITEM A2: REFERENCES

Please see below our list of references with regard to the essential qualifications necessary to complete these projects.

Consolidated and Action Planning Services:

- 2015-2019 Consolidated Plan and 2015 Action Plan

Client Project Manager: Sima Thakkar

Title: HUD Programs Administration Program Manager

Client: City of San Diego

Contact Information: (619) 236-5902 | sthakkar@sandiego.gov

LDC Project Manager: Vicky Joes

Affordable Housing Policy and Financing:

- Three Year Work Plan to Facilitate Transit Oriented Affordable Housing

Client Project Manager: Deborah Ruane

Title: Senior Vice President, Real Estate

Client: San Diego Housing Commission

Contact Information: (619) 578-7566 | debbier@sdhc.org

LDC Project Manager: Jennifer LeSar | Vicky Joes

- Affordable Housing Task Force, a Multi-Year Action Plan

Client Project Manager: Larry Florin

Title: Director of Housing and Intergovernmental Affairs

Client: County of Napa

Contact Information: (707)253-4621 | larry.florin@countyofnapa.org

LDC Project Manager: Jennifer LeSar

Homelessness:

- Implementation of the Plan to End Chronic Homelessness

Client Project Manager: Shaina Gross

Title: Vice President, Impact Strategies and Mobilization

Client: United Way of San Diego County

Contact Information: (858) 636-4181 | sgross@uwsd.org

LDC Project Manager: Jennifer LeSar | Vicky Joes

- Five Year Work Plan Toward the Goal of Ending Homelessness in Downtown San Diego

Client Project Manager: Nancy Lytle

Title: Assistant President

Client: Centre City Development Corporation (now Civic San Diego)

Contact Information: (619) 533-7173 | lytle@civicsd.com

LDC Project Manager: Jennifer LeSar

ITEM B: PROPOSED PROJECT APPROACH

Our proposed consolidated planning process will build upon the City of Porterville's (City) current Consolidated Plan, Action Plan, Analysis of Impediments, Housing Element, and other City Department strategic plans as a baseline; assess housing and community development needs, and recommend a pathway for the City to meet its goals by adopting strategic guidelines and actionable priorities for the use of federal entitlement funds.

To meet the City's goals and achieve a desirable work product, we will employ a collaborative, research-driven approach that emphasizes the management of all data collection and analysis, community outreach, and agency coordination while working closely with City staff through all stages of the process. LDC's proposed process for this engagement includes four phases (depicted below) that can be achieved in the sixteen month timeline, and balances local context research with the need for an efficient and focused process.

We will fulfill the completion of all required products and services identified in the Scope of Services while adhering to a strict timeline, with the final deliverables being the 2015-2020 Consolidated Plan, Annual Action Plan, Analysis of Impediments, and Housing Element. All documents will be supplied to City staff in both digital and hardcopy format in such a way as to allow for easy submission to HUD through the eConsolidated Planning Suite.

The following submission guidelines will be used:

- Two (2) bound copies of the drafts of each of the following plans:
 - 2015-2020 Consolidated Plan
 - 2015 Action Plan
 - Analysis of Impediments
 - Housing Element
- Three (3) bound copies of each of the approved final versions of the following plans:
 - 2015-2020 Consolidated Plan
 - 2015 Action Plan
 - Analysis of Impediments
 - Housing Element
- One (1) final original and two (2) copies of the following plan:
 - Analysis of Impediments
- One (1) CD of the drafts and approved final versions in Microsoft Office Word and Adobe PDF, with all supporting files for each of the following plans:
 - 2015-2020 Consolidated Plan
 - 2015 Action Plan
 - Analysis of Impediments
 - Housing Element
- One (1) resource file to include, at a minimum, a list of data sources, copy of data collected, consultations, records, and any other supporting documentation used to develop the following plan:
 - Analysis of Impediments

Additionally, we will adhere to the following minimum meeting schedule:

- One (1) initial kick-off meeting with City staff and partner agencies
- Sixteen (16) update conference calls with City staff (monthly or as needed)

- One (1) stakeholder forum/focus group with community providers, non-profits, and community advocates
- Two (2) public needs meetings with community leaders and residents
- One (1) presentation to City Council for Consolidated Plan adoption
- One (1) presentation to City Council for Housing Element adoption

In **Phase I**, we will set the stage with a client engagement kick-off meeting, to determine what the City envisions as the ideal outcome of the planning process, to begin review of any initial research or assessment of housing and community development needs, to identify research gaps, and to catalog available resources. During the project kick-off, LDC and City staff will finalize the project timeline, establish a communications protocol and connection to all relevant partner agencies, and exchange any applicable background materials.

Phase II entails the quantitative and qualitative data collection process whereby we hold public meetings and develop and implement the community survey, gather and review data, identify priorities, determine resources, formulate five-year goals, and draft the documents. This phase will be inclusive of consultations with public and private agencies and community stakeholders. First drafts of the Analysis of Impediments, and the Consolidated Plan Needs Assessment and Market Analysis will be provided at this time.

In **Phase III**, we will edit and finalize the documents. Drafts will also be submitted for staff to approve and all documents will be made available for public review. We recommend that City staff also provide individual briefings to Councilmembers as needed. LDC will collect and summarize public comments and conduct presentations before City Council. After final adoption, LDC will work with City staff to upload the Consolidated Plan and Action Plan to the eConsolidated Planning Suite and submit to HUD for review, and to submit the Housing Element to HCD.

Lastly, **Phase IV** provides ongoing support to City staff for technical assistance throughout the process until the Consolidated Plan and Action Plan are approved by HUD and the Housing Element is approved by HCD. LDC will be available for City staff questions and concerns for the duration of the project.

Phase I:	<u>Scope Planning and Initial Analysis</u>	(Aug 2014)
	❖ <i>Task 1.1: <u>Kick-off Meeting and Engagement Planning</u></i>	(Aug 2014)
Phase II:	<u>Data Collection and Preparation of Plans</u>	(Sep – Jan 2015)
	❖ <i>Task 2.1: <u>Public Participation Survey</u></i>	(Sep - Nov 2014)
	❖ <i>Task 2.2: <u>Community Engagement Plan and Meetings</u></i>	(Sep - Dec 2014)
	❖ <i>Task 2.3: <u>First Draft Analysis of Impediments</u></i>	(Dec 2014)
	❖ <i>Task 2.4: <u>First Draft Needs Assessment & Market Analysis</u></i>	(Jan 2015)
Phase III:	<u>Finalization of Plans</u>	(Feb 2015 - Dec 2015)
	❖ <i>Task 3.1: <u>Final Draft Analysis of Impediments</u></i>	(Feb 2015)

- ❖ Task 3.2: 75% Draft Consolidated Plan (Mar 2015)
- ❖ Task 3.3: First Draft Citizen Participation Plan (Mar 2015)
- ❖ Task 3.4: First Draft Strategic Plan and Action Plan (Apr 2015)
- ❖ Task 3.5: Final Draft Citizen Participation Plan (Apr 2015)
- ❖ Task 3.6: Final Draft Strategic Plan and Action Plan (May 2015)
- ❖ Task 3.7: 100% Final Draft Consolidated Plan (May 2015)
- ❖ Task 3.8: Consolidated Plan Public Comment, Hearing, and Adoption(Jun - Jul 2015)
- ❖ Task 3.9: Final Consolidated Plan and HUD Submission (Aug 2015)
- ❖ Task 3.10: 75% Draft Housing Element (Aug 2015)*
- ❖ Task 3.11: 100% Draft Housing Element (Sep 2015)*
- ❖ Task 3.12: Housing Element Public Comment, Hearing, and Adoption (Oct - Nov 2015)*
- ❖ Task 3.13: Final Housing Element and HCD Submission (Dec 2015)*

Phase IV: Technical Assistance to City Staff (Until HUD/HCD Approval)

- ❖ Task 4.1: Technical Support and Guidance to City Staff

*If City staff desires, Housing Element deliverables can be submitted concurrently with Consolidated Plan deliverables. However, we recommend against this, as this would be a large amount of reviewing and copy editing for City staff and would make it more difficult to meet HUD and HCD deadlines.

In the following pages, we provide a more detailed account of the course of action suggested by LDC, a timeline for completion, and the deliverable submitted for each phase of the proposed work plan.

Phase I: Scope Planning and Initial Analysis (Aug 2014)

Objective: Phase I of this process involves developing a planning framework that confirms the tasks of the entire engagement, lays out a plan for the work to be completed within the budget and timeframes allotted, reviews the strategic questions that the planning process will address, and clarifies the understanding of the landscape in which the City is situated.

Task 1.1: Kick-off Meeting and Engagement Planning (Aug 2014)

- **Meeting:** LDC will hold an initial meeting with City staff to review and finalize the planning process and clarify the project timeline. Prior to the kick-off meeting, LDC will review existing housing needs and requirements, including a review of background planning documents such as prior year Consolidated Plans and Action Plans, Analysis of Impediments, Housing Elements, and affordable

housing budgets. LDC will establish a plan to meet and communicate with City staff and any partner agencies during the course of the project. This will help ensure a collaborative and communicative planning process that stays on time and on budget. The purpose of this meeting will be to confirm expectations and collect baseline information about City perspectives of the Consolidated Plan, Action Plan, Citizen Participation Plan, Analysis of Impediments, and Housing Element.

- **Work Product: Email confirming work plan, timeline, schedule, and content of engagement activities and expectations**

Phase II: Data Collection and Preparation of Plans

(Sep – Jan 2015)

Objective: Phase II entails the consolidated planning process, whereby we conduct research, hold public meetings, and identify priorities. This phase will include drafting the Consolidated Plan and the Analysis of Impediments. Throughout the process we will collect, analyze, and report on acquired data, including housing price indices, public housing information, homeless providers, and unmet need. We will utilize HUD Comprehensive Housing Affordability Strategy (CHAS) data, the U.S. Census Bureau, the American Community Survey (ACS), and information provided by City staff, public and private agencies, and the residents of the City of Porterville.

Task 2.1: Public Participation Survey (September – November 2014)

In addition to the quantitative demographic and market research we conduct, LDC will develop a web-based survey in order to solicit supporting information from diverse stakeholders. The survey instrument will allow us to test the prevalence of attitudes and trends detected via other research methods, solicit qualitative data, and reach a wide array of respondents. Question and answer formulations will be tested and informed by research, interviews, and feedback from the City. The LDC research team will design an appropriate citywide sampling strategy, administer the survey, and tabulate the results.

LDC will be responsible for drafting the survey (with feedback and approval from the City) and compiling, organizing, and analyzing the data received. LDC recommends that the City translate the surveys into applicable languages to widen community access. We anticipate having the survey administered primarily online in order to easily aggregate responses and to avoid unnecessary time and budget expenditures associated with transposing paper surveys. To further reduce budgetary costs and to conform to the City's messaging authority, which will boost participation, we anticipate having the City assist in public outreach and distribution of the survey. We recommend that this outreach include the following: online availability of the survey on the City's home web page, the Community Development Department web page, marketing the survey in relevant local community publications, advertising the survey on broadcasting stations of the City, and distributing the survey through all appropriate City and Council email distribution lists and to public housing sites, school districts, health providers, social service providers, and community and faith-based organizations. The survey will also be made available at all community and stakeholder outreach meetings (see 2.2 below for more information on outreach meetings).

- **Work Product:**
 - **Develop survey for public participation**
 - **Compile survey results and a survey assessment (will also be included in Consolidated Plan narrative)**

Task 2.2: Community Engagement Plan and Meetings (September – November 2014)

LDC will coordinate with City staff to prepare a plan and timeline for public participation in the development of the documents to include the development and distribution of the community survey (see 2.1 above), and the number and timing of proposed community and stakeholder meetings and interviews. This plan and timeline will be made available to the public to explain the process. LDC will conduct the following activities:

- Preparation of all presentations, flyers, surveys (see 2.1) and interview questionnaires as necessary. These materials will be provided to City staff for review during development and in advance of meetings or distribution to the public;
- Presentations at community and public meetings and moderating discussions to gather input on community needs. LDC senior staff members will lead many of these meetings, and we anticipate having the City provide some support staff to take notes, lead discussions of break-out groups, and assist in ensuring valuable participation of the attendees.
 - **Meetings:**
 - A minimum of two (2) neighborhood meetings/focus groups seeking the comments and input of residents. These should be scheduled at a variety of times, including evenings, to accommodate the diverse schedules of participants. LDC will facilitate these community outreach meetings and invite the participation of City Councilmembers.
 - A minimum of one (1) stakeholder meeting/focus groups with community providers, non-profits, and community advocates to be determined jointly by City staff and LDC. This meeting will be led and facilitated by LDC and attended by City staff. Stakeholder meetings will include representatives from any City departments or service providers utilizing CDBG funds for projects, housing agencies, social service agencies, CHDO representatives, and other agencies or individuals deemed appropriate.
- LDC and the City will conduct community and stakeholder outreach with:
 - Low- to moderate-income (LMI) city residents within impacted census tracts;
 - Elected officials, community leaders, and advocates;
 - Health and human services, and housing and workforce service providers;
 - Agencies representing special needs populations including veterans, seniors and homeless;
 - Previous HUD entitlement grant applicants; and
 - Community and housing development organizations.
- Community and stakeholder outreach will include a presentation on the Consolidated Plan, Analysis of Impediments, and Housing Element, their purpose and process, and an overview of past plans, including allocations of entitlement funds. LDC will solicit participant feedback on needs with respect to housing, economic development, community development/public services, and special-needs populations, and facilitate needs ranking exercises by participants. This will be followed by group discussion. LDC will gather and assess the comments and feedback received at these meetings.

LDC will document the process and provide a summary of efforts to broaden public participation and input in the development of the documents, including outreach to LMI and special-needs populations.

- **Work Product:**
 - **Community and stakeholder engagement strategy and timeline**
 - **Consolidated list of suggested organizations and stakeholders for outreach**
 - **Presentations, flyers, and materials for community and public meetings**
 - **Community and stakeholder meeting facilitation**

Task 2.3: First Draft Analysis of Impediments (December 2014)

A review of impediments to fair housing choice will be undertaken to include housing conditions, public and private sectors, the availability of accessible affordable housing, and housing policies, practices, and procedures within the City of Porterville. LDC will gather data from the US Census Bureau, HUD, and the American Community Survey as well as local fair housing councils, legal aid societies, and service providers. LDC will develop graphs, tabular data, and GIS maps indicating areas of protected class concentrations. LDC will analyze data collected and draft a report to be submitted for adoption, which will identify the specific barriers which limit, restrict, and affect fair housing choice and an assessment of how City laws affect the availability, accessibility, and location of housing. The Analysis of Impediments will reveal actions the City should undertake to reduce identified impediments.

- **Work Product:**
 - **Consultations with public and private agencies**
 - **First Draft Analysis of Impediments**

Task 2.4: First Draft Needs Assessment and Market Analysis (January 2015)

LDC will be responsible for creating the Consolidated Plan Needs Assessment and Market Analysis, utilizing the eConsolidated Planning Suite templates. In preparing these sections, a wide range of service providers will be contacted through outreach meetings (see 2.2) as well as directly to compile information on housing and community development existing conditions and needs. This will include input from agencies representing LMI persons, as well as those with HIV/AIDS, homeless persons, LMI youth, persons with disabilities, elderly persons, victims of abuse and violence, and persons with alcohol/substance abuse issues. In addition to providing an analysis of the housing market, LDC will facilitate the Needs Assessment and Market Analysis process by gathering, organizing, assessing and analyzing quantitative (housing and community development research, including review of available data, reports, and documents) and qualitative (community input through citizen participation) data collection.

- **Work Product: First Draft Needs Assessment and Market Analysis**

Phase III: Finalization of Plans (Feb 2015 – Nov 2015)

Objective: The third major component of this process is the finalization of the Consolidated Plan and Analysis of Impediments documents, which will be used in the drafting of the Housing Element.

Task 3.1: Final Draft Analysis of Impediments (February 2015)

After incorporating feedback received from the review of the preliminary draft, LDC will deliver a final bound edition of the Analysis of Impediments to City staff. The final document will include any and all requested revisions from the City, and will comply with all HUD regulations.

- **Work Product: Final Draft Analysis of Impediments**

Task 3.2: 75% Draft Consolidated Plan (March 2015)

Following completion of the Needs Assessment, Market Analysis, and the gathering of community and public input, LDC will deliver a preliminary draft Consolidated Plan with summary findings to City staff for review and comment. We will seek feedback from City staff and incorporate revisions into the final Consolidated Plan.

- **Work Product: 75% Draft Consolidated Plan**

Task 3.3: First Draft Citizen Participation Plan (March 2015)

LDC will deliver a draft edition of the Citizen Participation Plan to City staff for review. We will seek feedback from City staff and incorporate revisions into the final Consolidated Plan.

- **Work Product: First Draft Citizen Participation Plan**

Task 3.4: First Draft Strategic Plan and Action Plan (April 2015)

As the most critical components of the consolidated planning process, the Strategic Plan and Action Plan will prioritize the projects and activities proposed, guiding allocation for federal funds provided under the CDBG and HOME entitlements. These documents will be fully vetted by all relevant City departments and partner agencies and will include HUD allocation amounts/estimates for all five program years.

- **Work Product: First Draft Strategic Plan and Action Plan**

Task 3.5: Final Draft Citizen Participation Plan (April 2015)

After incorporating feedback received from the review of the preliminary draft, LDC will deliver a final draft of the Citizen Participation Plan to City staff. The final Citizen Participation Plan will include all requested revisions from the City, and will comply with all HUD regulations.

- **Work Product: Final Draft Citizen Participation Plan**

Task 3.6: Final Draft Strategic Plan and Action Plan (May 2015)

LDC will incorporate all final feedback received for the 100% final draft of the Strategic Plan and Action Plan and deliver the final drafts to the City. Both plans will include any and all requested revisions from the City, and will comply with all HUD regulations.

- **Work Product: Final Draft Strategic Plan and Action Plan**

Task 3.7: 100% Final Draft Consolidated Plan (May 2015)

After incorporating feedback received from the review of the preliminary draft Consolidated Plan, Strategic Plan, and Action Plan, LDC will deliver a final draft of the Consolidated Plan and Action Plan to City. Both plans will include any and all requested revisions from the City, and will comply with all HUD regulations.

- **Work Product: 100% Final Draft Consolidated Plan and Action Plan**

Task 3.8: Consolidated Plan Public Comment, Hearing and Adoption (June - July 2015)

The required public comment period for the Consolidated Plan and Action Plan will begin in June 2015. LDC will collect, compile, and incorporate comments received during the public comment period. Based on the feedback collected through the public review period, LDC will make edits, attach all comments, and provide the City with a 100% final Consolidated Plan and Action Plan for review and final feedback. LDC will gather and analyze the City's final feedback and edits and incorporate these changes into the final plans for City Council adoption.

- **Meeting:** The City will facilitate a Public Hearing to adopt the Consolidated Plan, Action Plan, and Analysis of Impediments. At this meeting, LDC will be responsible for all presentations before City Council and City staff will provide assistance and participation.
- **Work Product: Summary of comments received**

Task 3.9: Final Consolidated Plan and eConsolidated Planning Suite Upload (August 2015)

Lastly, LDC will assist City staff in submitting the electronic Consolidated Plan and Action Plan to HUD in August 2015. All additional content in the form of other data, maps, pictures, text, and tables will be compiled, organized, and tabulated to ensure that it meets the necessary standards for successful upload.

- **Work Product: 100% Final Consolidated Plan and First Year Action Plan for submission to HUD via eConsolidated Planning Suite**

Task 3.10: 75% Draft Housing Element (August 2015)*

After completing a thorough evaluation of the effectiveness, appropriateness and progress made toward implementation of the previous Housing Element, and utilizing data collected throughout the Consolidated Plan process, LDC will deliver a preliminary draft Housing Element with summary findings to City staff for review and comment. We will seek feedback from City staff and incorporate revisions into the final Housing Element.

- **Work Product: 75% Final Draft Housing Element**

Task 3.11: 100% Draft Housing Element (September 2015)*

After incorporating feedback received from the review of the preliminary draft Housing Element, LDC will deliver a final draft of the Housing Element to the City. The Housing Element will include all requested revisions from the City, and will comply with all HCD regulations.

- **Work Product: 100% Final Draft Housing Element**

Task 3.12: Housing Element Public Comment, Hearing, and Adoption (October – November 2015)*

LDC will collect, compile, and incorporate comments received during the public comment period. Based on the feedback collected through the public review period, LDC will make edits, attach all comments, and provide the City with a 100% final Housing Element for review and final feedback. LDC will gather and analyze the City's final feedback and edits and incorporate these changes into the final Housing Element.

- **Work Product: Summary of comments received**

Task 3.13: Final Housing Element and HCD Submission (December 2015)*

Lastly, LDC will assist City staff in submitting the Housing Element to HCD in December 2015. All additional content in the form of other data, maps, pictures, text, and tables will be compiled, organized, and tabulated to ensure that it meets the necessary standards for successful upload.

- **Work Product: 100% Final Housing Element for submission to HCD**

Phase IV: Technical Support to City Staff (Until Approved by HUD and HCD)

Objective: The last stage of LDC's process in developing the Consolidated Plan, Action Plan, Citizen Participation Plan, Analysis of Impediments, and Housing Element for the City of Porterville will be to provide ongoing technical assistance and guidance to City staff until the Plans are approved by HUD and HCD. This includes providing modifications to the documents as needed to gain approval by HUD and HCD. LDC will also be available to the City for questions and concerns.

Task 4.1: Technical Support and Guidance to City Staff (Until HUD and HCD Approved)

LDC will provide technical support to City staff throughout the approval process, as needed. If initial submission is not approved, LDC will work with staff to make all necessary changes and revisions to the plans for resubmission as needed.

- **Work Product: Ongoing technical support and guidance until approved. Assistance with revisions and resubmission if needed.**

*If City staff desires, Housing Element deliverables can be submitted concurrently with Consolidated Plan deliverables. However, we recommend against this, as this would be a large amount of reviewing and copy editing for City staff and would make it more difficult to meet HUD and HCD deadlines.

ITEM B2: PROPOSED PROJECT SCHEDULE

Deliverables	2014					2015											
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<i>Phase I: Scope Planning and Initial Analysis</i>																	
1.1: Kick-off Meeting & Engagement Planning																	
<i>Phase II: Data Collection and Preparation of Plans</i>																	
2.1: Public Participation Survey																	
2.2: Community Engagement Plan, Meetings and Consultations																	
2.3: First Draft Analysis of Impediments																	
2.4: First Draft Needs Assessment & Market Analysis																	
<i>Phase III: Finalization of Plans</i>																	
3.1: Final Draft Analysis of Impediments																	
3.2: 75% Draft Consolidated Plan																	
3.3: First Draft Citizen Participation Plan																	
3.4: First Draft Strategic Plan and Action Plan																	
3.5: Final Draft Citizen Participation Plan																	
3.6: Final Draft Strategic Plan and Action Plan																	
3.7: 100% Final Draft Consolidated Plan																	
3.8: Consolidated Plan Public Comment, Hearing, and Adoption																	
3.9: Final Consolidated Plan for Upload to IDIS																	
3.10: 75% Draft Housing Element*																	
3.11: 100% Final Draft Housing Element*																	
3.12: Housing Element Public Comments, Hearing and Adoption*																	
3.13: Final Housing Element for Submission to HCD*																	
<i>Phase IV: Technical Assistance to City Staff</i>																	
4.1: Technical Support and Guidance to City Staff																	

* Housing Element deliverables can be submitted concurrently with Consolidated Plan deliverables.

ITEM C1: STAFF QUALIFICATIONS

LDC is very familiar with the work involved in crafting housing documents, as well as the specific requirements of the Consolidated Planning process. Vicky Joes, our Project Manager and LDC Principal and Director of Housing Policy and Programs, developed her expertise in the consolidated planning process and applicable HUD regulations when she served as the project manager and coordinator on the development of the **2010-2014 Consolidated Plan** for the City of San Diego. In this capacity, Ms. Joes coordinated County, City, and Commission officials and staff members to successfully draft the Consolidated Plan as well as obtain City Council adoption and HUD acceptance. This work occurred while Ms. Joes was employed by the San Diego Housing Commission. Her expertise was furthered in her role with LDC as project manager for the City of San Diego's **2015-2019 Consolidated Plan and 2015 Action Plan**, both of which utilized the eConsolidated Planning Suite. City Council adopted the Plan in April 2014 and HUD approval is expected by the end of June 2014. Throughout this time Ms. Joes has continued to keep herself up to date on Consolidated Plan regulations and policies, including the recently released HUD online template for submission of the Consolidated Plan, Annual Action Plans, and Consolidated Annual Performance Evaluation Reports (CAPER).

Primary staff support for research, writing and community outreach will be provided by LDC Associate Keryna Johnson and Research Analyst Marina Espinoza. Ms. Johnson has her Masters in City Planning and was instrumental in the research and drafting of the 2015-2019 Consolidated Plan for the City of San Diego. Prior to her work with LDC, Ms. Johnson held a position with the City of San Diego Planning, Neighborhoods and Economic Development Department, where she supported the research, outreach, and drafting of Community Plan updates. As a bilingual native of the Central Valley, Ms. Espinoza brings local knowledge of her hometown of Hanford and the surrounding cities, and has an understanding of their significance in the context of the larger region, as well as the organizations committed to addressing the needs of their residents.

As detailed below, members of our team have considerable experience providing directly applicable and highly relevant consulting services. We have included biographies of Jennifer LeSar and Vicky Joes, who will have primary responsibility for this project, and résumés for additional staff.

Jennifer LeSar **President, LeSar Development Consultants**



Project Role

- Overall quality control of final work products
- Direct oversight of any controversial or extremely complex matters
- Subject matter expert on community and affordable housing development, finance, and policy

Jennifer LeSar is an expert in community development and real estate finance. She is actively engaged in ensuring quality delivery of services and products to the clients of LeSar Development Consultants (LDC), which she founded in 2005, as well as the on-going management of its affiliate, ELP Advisors.

With more than 25 years of experience in the real estate development and investment banking industries, Jennifer LeSar brings a diverse background to her work in community development and urban revitalization. Her technical expertise spans from policy and program development to comprehensive strategic planning for top executives and executive teams to the origination and underwriting of complex investments in

equity funds, multi-family portfolios, historic, and low-income tax credit properties utilizing federal and state financing programs.

Prior to founding LDC and co-founding ELP Advisors, Ms. LeSar worked for nine years as an investment banker arranging equity investments on behalf of Edison Capital and Bank of America, and for twelve years as an affordable housing developer. Ms. LeSar has developed and /or financed over \$4 billion in residential and commercial properties.

Ms. LeSar serves on the San Diego Foundation Board of Directors (2012 – Present) where she sits on the Leadership Board for the Foundation's Center for Civic Engagement, and is currently on the Executive Search Organizing Committee that is overseeing the search for a new Foundation CEO. As part of that process she is Chairing the Community Outreach Committee that will engage the San Diego public through focused and targeted community outreach meetings. The goals of this process are to build and/or deepen the Foundation's relationships with communities, and to solicit feedback on the qualities and personal characteristics that the public feels are important in the next CEO.

She has held a variety of leadership positions in the redevelopment and affordable housing arenas, including: United Way Home Again Co-Chair (2010 - 2011); Chair, Treasurer and Board Member of the Centre City Development Corporation (2002 - 2009); and Board Vice President, Director and Acting President of the San Diego Housing Federation (1996 - 1999). Ms. LeSar's educational achievements include two advanced degrees from UCLA – an M.B.A. in Real Estate, Finance and Nonprofit Management and an M.A. in Urban Planning, and she received her B.A. from Bryn Mawr College in political science and economics.

Victoria Joes
Principal, LeSar Development Consultants



Project Role

- Project Manager
- Responsible for progress on scope of work
- Lead on writing and oversight of the development of the Consolidated Plan
- Oversees all work, outreach efforts, and policy research conducted by Associates
- Subject matter expert on Consolidated Planning Process, housing policy and programs, community outreach and citizen engagement plans, and systems change work around ending homelessness

As Principal and Director of Housing Policy and Programs, Vicky Joes develops, implements, and oversees our work on housing and homelessness policy, planning, and program initiatives—particularly our efforts to end homelessness in San Diego. She also serves on internal firm multi-disciplinary teams working on urban development and human capital development initiatives. Ms. Joes has a passion for improving economic and residential environment through sound public policy, and brings with her an impressive network and knowledge of local government officials and development professionals.

Vicky Joes will serve as our Project Manager, and she has nearly a decade of experience working with HUD's CDBG and Consolidated Planning Process. Ms. Joes began her career as a first-time homebuyer mortgage counselor for Delaware County's CDBG program. She administered the Homeownership First Pre-Purchase Program and partnered with the Delaware County Office of Housing and Community Development to implement program changes, improve programs effectiveness, protect client interests and report and ensure compliance. Several years later at the San Diego Housing Commission, Ms. Joes oversaw the

administration of the City of San Diego's CDBG program to include compliance with all applicable laws, regulations, policies and procedures, and collected and maintained statistics, informational records, and documentation in accordance with contractual requirements and federal and state regulations. Ms. Joes developed her expertise of the Consolidated Planning Process when she served as the project manager and coordinator on the development of the 2010-2014 Consolidated Plan for the City of San Diego. In this capacity, Ms. Joes coordinated County, City, and Commission officials and staff members in the successful drafting of the Consolidated Plan.

Prior to joining our firm, Ms. Joes served as Policy Advisor for the Mayor's Office of the City of San Diego, during which time she developed and implemented the Mayor's policies, convened and lead cross-sectional planning efforts, and provided high-level strategic planning and analysis in areas related to special districts, housing, homelessness, grants and parks. Previous to her work with the Mayor's Office, Ms. Joes was a senior analyst at the San Diego Housing Commission. She also previously held a senior position at the San Diego Workforce Partnership whereby she developed expertise in workforce and economic development strategies.

Ms. Joes received her Master's Degree in Public Administration from San Diego State University and her Bachelor's Degree in Psychology from St. Joseph's University.



JENNIFER LESAR PROFESSIONAL EXPERIENCE



PRESIDENT AND CEO

LeSar Development Consultants | 2005 – Present

MANAGING MEMBER

Estolano LeSar Perez Advisors, LLC | 2011 – Present

Jennifer LeSar is an expert in community development and real estate finance. She is actively engaged in ensuring quality delivery of services and products to the clients of LeSar Development Consultants, which she founded in 2005, as well as the on-going management of its affiliate, ELP Advisors. Both firms assist clients with growing healthy, thriving, and vibrant communities.

INVESTMENT MANAGER/SENIOR VICE PRESIDENT

Bank of America | 2001 – 2005

2/05 – 8/05, Senior Client Manager, Syndicator Finance Group: Relationship management responsibility for top-tier LIHTC syndicators and their sibling debt companies with task responsibilities for servicing their overall banking needs through provision of debt products and referrals to other internal banking partners for treasury management, public finance, loan syndications and global derivative products. Day-to-day responsibility for developing, enhancing and growing these relationships through the provision of real estate fund-collateralized products including bridge loans and subscription lines of credit, and corporate-level collateralized facilities including working capital lines of credit. Also responsible for the development of customized national lending programs tailored to the syndicators' unique needs.

05/03 – 2/05, Multi-Family Exit Strategies Manager, Real Estate Development Group: Responsible for research and development, and implementation business planning for the start-up of a third-party financed, bank-managed real estate equity investment fund. Built in-house expertise in market expectations concerning fiduciary responsibilities, governance, technology platform management, impacts of Sarbanes-Oxley, etc. Hired the external fund launch team including legal, technical accounting, placement agent, and valuation services providers. Garnered internal approvals from corporate tax, accounting policy, legal, finance, and first round credit approvals. Fund launch delayed due to opportunity to sell asset more profitably in the persistently low cap rate market.

2/01 – 8/03, Investment Manager, Historic Tax Credit Team: Identify, analyze, negotiate, structure, underwrite and close company's historic tax credit and real estate mezzanine equity investments into retail, office, mixed-use and residential transactions. Developed and implemented multi-state marketing strategy. Individual transactions have ranged from \$3 MM to \$28 MM. Dispose of Southern California work-out portfolio of real estate developments in process and formerly managed by the Bank's community development corporation staff. Participate in macro-level strategic planning and economic and industry analysis. Familiarity with banking industry Community Reinvestment Act requirements.

Accomplishments:

- Managed new business development and relationships primarily in the Western United States and secondarily across the Bank's 23-state franchise.
- Originated, underwrote and closed HTC, LIHTC and private equity investments approximating \$81 MM from 2001 through 2003 (a 26-month period).
- Completed disposition of six-asset, multi-ownership California RED work-out portfolio (2001 to 2004)

ACQUISITIONS DIRECTOR

Edison Capital | 1997 – 2001

Identified, analyzed, negotiated, structured and underwrote company's real estate and low-income housing and historic tax credit investments including urban redevelopment projects, multi-family portfolios, historic commercial and residential buildings, new construction, rehabilitation and work-out opportunities. Developed and managed multi-state marketing strategy. Extensive technical proficiency in tax-exempt bond transactions, preservation/expiring use transactions, as well as all sources of public financing. Familiarity with historic and HOPE IV structuring and tax issues. Extensive technical knowledge of tax and legal issues in affordable housing finance and ability to structure and close deals and conduct workouts. Left company due to its exit from the acquisitions business.

Accomplishments:

- Managed new business development and relationships in 7 western states with focus on California and Washington. Worked with for-profit and non-profit developers of all sizes.
- Pioneered new investment product (HUD expiring use deals)
- Originated 33 investments totaling \$85 million in investment through year-end 1999 (a 30-month period). Edison didn't originate any deals in 2000 due to the California utility crisis. Closed multiple transactions.
- Formally recognized for exceptional teamwork ability.

EXECUTIVE DIRECTOR

Community Housing of North County (CHNC) now known as Community HousingWorks | 1993 – 1997

PROJECT MANAGER

Los Angeles Community Design Center (now Abode Communities) | 1992 – 1993

RENTAL DEVELOPMENT PROGRAM MANAGER

Local Initiatives Support Corporation | 1990 – 1991

Directed an affordable housing development and training program for emerging community-based development corporations in Compton, Crenshaw, and South Central Los Angeles.

Accomplishments include:

- Used a \$6.5 million allocation of Century Freeway Housing Program funds to leverage an additional \$11 million in state, local and investor funds.
- Developed 162 units in five projects.
- Managed \$1.5 million predevelopment loan portfolio including evaluation of \$750,000 in predevelopment requests.

DEVELOPMENT ANALYST

Los Angeles Community Design Center (now Abode Communities) | 1988 – 1990

Analyzed financial feasibility of new and on-going residential projects. Conducted site searches; researched funding sources; gathered information on zoning, general plan conformance, and construction costs.

EDUCATION

MASTERS OF BUSINESS ADMINISTRATION, Anderson Graduate School of Management, UCLA | 1992

Concentrations in Finance and Real Estate

MASTERS OF ARTS IN URBAN PLANNING, Graduate School of Architecture and Urban Planning, UCLA | 1991

Concentrations in Housing Development, Housing Policy, and the Built Environment

BACHELOR OF ARTS, Bryn Mawr College | Class of 1986; Graduated 1987

Major: Political Science; Minor: Economics



VICTORIA JOES PROFESSIONAL EXPERIENCE



PRINCIPAL | DIRECTOR OF HOUSING POLICY AND PROGRAMS

LeSar Development Consultants | 2012 - Present

Ms. Joes develops, implements, and oversees our work on housing and homelessness policy, planning, and program initiatives – particularly our efforts to end homelessness in San Diego. She also serves on internal firm multi-disciplinary teams working on urban development and human capital development initiatives.

POLICY ADVISOR

City of San Diego-Office of the Mayor | 2010 – 2012

Developed and implemented the Mayor's policies and priorities for the City of San Diego in areas related to housing, homelessness, grants, special districts, parks and special ad hoc assignments.

SENIOR PROGRAM ANALYST

San Diego Housing Commission | 2009 – 2010

Initiated and executed housing policy efforts at the local, state and federal level through legislation and ordinances that advance affordable housing production and protect existing stock.

PROGRAM ANALYST

San Diego Housing Commission | 2007 – 2009

Monitored agency compliance with all applicable law, regulation, policy and procedures and managed projects through coordination with various public sector and private industry representatives and ensure successful project completion pursuant to all applicable regulations and objectives.

PROJECT COORDINATOR

San Diego Workforce Partnership | 2005 – 2007

Coordinated with the Board of Directors and Executive Team to determine organizational priorities and researched grant opportunities to support priorities.

BUSINESS SERVICES COORDINATOR

San Diego Workforce Partnership | 2004 – 2005

Served as the primary point of contact for over 100 Metro Region employers working with the One-Stop Career Center Network and the Local Workforce Investment Board.

EDUCATION

LEAD IMPACT, San Diego, CA

San Diego State University, San Diego, CA

Master of Public Administration, January 2005

Saint Joseph's University, Philadelphia, PA

Bachelor of Science, Psychology, June 1997



KERYNA JOHNSON PROFESSIONAL EXPERIENCE



ASSOCIATE

LeSar Development Consultants | 2013 - Present

Assisted in the development of the City of San Diego's 5-Year Consolidated Plan to assess affordable housing and community development needs and market conditions. Coordinated stakeholder and community outreach in LMI communities. Performed market analysis, including housing, homeless, and community development research. Supported the drafting of data-driven reports for City Council.

PLANNING INTERN

City of San Diego Planning, Neighborhoods & Economic Development Department | 2013 - 2014

Supported comprehensive community plan updates for Southeastern San Diego and the Encanto Neighborhoods – long-range, physical development guides containing tailored policies for implementing the General Plan in the community, created through an in-depth, community-based planning process engaging a broad range of stakeholders. Supported in preparing community goals and recommendations, with an emphasis on sustainable design principles, outlined in an illustrative action-oriented planning document.

ALLIANCE COORDINATOR

Ag Innovations Network | 2012-2013

Coordination for the San Diego County Food System Alliance, a multi-stakeholder collaborative focused on improving outcomes in the regional food system. Supported the co-creation of policies and collective actions that address countywide health, sustainability, hunger, and economic development issues. Oversaw recruitment and retention of Alliance members, meeting logistics, external and internal communications, committee facilitation, fund development, and functions leading to successful Alliance outcomes.

PROJECT COORDINATOR

County of San Diego Health & Human Services Agency | 2012 - 2013

Coordination for the Communities of Excellence in Nutrition, Physical Environment, and Obesity Prevention (CX³) program in Encanto neighborhood. Recruited residents to engage in food retail and walkability assessments evaluating the availability and accessibility of healthy foods within their neighborhood. Worked directly with community members to set priorities based on the results and to implement strategic, resident-led action plans. Supported residents in presenting findings and making recommendations to policy makers.

PLANNING CONSULTANT

Groundwork San Diego-Chollas Creek | 2011 - 2012

Master planning for the Earthlab, a 4-acre open space parcel and dynamic outdoor learning lab. Fostered relationships with local organizations and resident groups to generate interest in environmental stewardship projects. Provided key land use analysis and mapping, enabling Groundwork to competitively pursue funding opportunities. Acted as a liaison with City staff and developed collaborative stakeholder partnerships.

EDUCATION

San Diego State University, San Diego, CA

Master of City Planning May 2014 | SDSU Master of City Planning Outstanding Student, 2012
Bachelor of Science, Business Management, Specialization in Entrepreneurship, May 2010



MARINA ESPINOZA PROFESSIONAL EXPERIENCE



RESEARCH ANALYST

LeSar Development Consultants | 2013 – Present

Ms. Espinoza supports the senior team through the research, writing, and preparation of reports and communications materials in the areas of community and economic development and homelessness.

INTERN

San Diego Housing Federation | 2013

Researched, drafted, and edited property profile sheets to inform policymakers and elected officials on financing sources of specific affordable housing developments.

ADMINISTRATIVE COORDINATOR

UCSD Center for U.S.-Mexican Studies | 2012 – 2013

Oversaw promotion of weekly events through social media, press releases, and direct mailings. Managed database of 6,500+ contacts and updated website content to highlight conferences and research. Liaised with participants from government, non-profits, and academia during visits to Center for flagship events.

RESEARCH ASSISTANT

UCSD Department of Pediatrics | 2011 – 2012

Worked to implement a clinical research study investigating the role of support groups in weight loss for obese and overweight Hispanic parents and children in Chula Vista. Screened families to determine eligibility in study and administered exit surveys to participants. Assisted with parent and child group activities.

RESEARCH EXPERIENCE

“The Informal Economy in City Heights” | 2013

Worked in a team to design and conduct a 42 question survey intended to identify resident participation in the informal economy in City Heights; administered to 100+ residents. Authors used data gathered to prepare a report for the City Heights Community Development Corporation, which includes policy and program recommendations to strengthen economic development.

“Barrio Logan: Community Advocacy, Public-Private Partnerships, & Affordable Housing” | 2012 – 2013

Thesis identified the importance of community involvement in advocating for zoning changes and collaborating in the creation of a public-private partnership to develop affordable housing in San Diego’s Barrio Logan community. Utilized a variety of research tools, including recordings of press conferences.

“University City: A Study of Discontinuity Between Neighborhoods” | 2012

Worked in a team to prepare a report discussing the effect of community leaders’ shift in focus from catering to student needs to promoting research and development and the resulting impact on University City neighborhoods. Research included a review of press clippings, community plan, interviews, and data.

EDUCATION

University of California, San Diego (UCSD)

Bachelor of Arts, Urban Studies and Planning, June 2013 | Meritorious Community Service Award 2013

Overview of LeSar Development Consultants

LeSar Development Consultants (LDC) is a social innovation firm that assists clients with growing healthy, thriving, and vibrant communities. We provide creative solutions to complex problems with our expertise in community development, housing, homelessness, workforce and economic development, sustainability, transportation, and civic and stakeholder engagement.

We have ample experience and expertise in communications, community outreach, and strategic planning. We are successful in meeting and exceeding clients' needs and expectations. We value integrity, equity, innovation, sustainability, transparency, partnerships, and interdisciplinary collaboration. These are values that we incorporate in our daily operations and they are reflected in the services and solutions that we offer.

Founded in 2005 by Jennifer LeSar, LDC is certified by the State of California as a woman-owned, small business corporation and has three offices located in San Diego, Los Angeles, and Sacramento. LDC has completed over 85 scopes of work with 13 public agencies and municipal governments since 2005.

Client and Project Profiles



1. CITY OF SAN DIEGO

<u>Project Name:</u>	2015 – 2019 Consolidated Plan and 2015 Action Plan
<u>Municipality/Agency:</u>	City of San Diego
<u>Location:</u>	San Diego City
<u>Client Project Manager:</u>	Sima Thakkar HUD Programs Administration Program Manager (619) 236-5902 sthakkar@sandiego.gov
<u>Consultant:</u>	LeSar Development Consultants
<u>LDC Project Manager(s):</u>	Vicky Joes 619-236-0612 x 102
<u>Project Cost:</u>	\$99,800
<u>Award and Completion Dates:</u>	October 2013 – May 2014 (ongoing)

Project Type and Scope of Services Provided:

- Report writing (Consolidated Plan and Action Plan documents and City Council and Board Reports)
- Data collection and analysis of community needs and LMI index populations
- Community outreach strategy development and implementation for underserved populations

- Stakeholder meeting/forum design and facilitation
- Drafting, distributing, and analyzing a community needs survey
- Creation of collateral (flyers, public notices, and PowerPoint presentations)
- Design and implementation of a social media campaign for community engagement
- Community outreach and stakeholder engagement

LDC completed the **2015-2019 Consolidated Plan**, **2015 Action Plan**, and **Citizen Participation Plan** for the City of San Diego. The plans determined the goals and resulting allocation priorities for federal funds provided under the Community Development Block Grant Program (CDBG), HOME Investment Partnerships Program (HOME), Emergency Solutions Grants Program (ESG), and Housing Opportunities for Persons with AIDS Program (HOPWA) entitlements. All City deadlines were successfully met and the plans were submitted to HUD via the eConsolidated Planning Suite in May 15, 2015. The plan can be viewed here:

<http://www.sandiego.gov/cdbg/pdf/2014/fy2015conplandraft.pdf>

LDC's planning process to create the Consolidated Plan served as the framework for a community-wide dialogue to identify housing, economic, and community development priorities. The community outreach plan was multifaceted and extensive:

- LDC created a survey to solicit community input. The multi-lingual survey was distributed broadly to 4,400 entities, organizations, agencies, citizens, and groups. Electronic responses were possible via smartphones, tablets, and web browsers. Hard copy surveys were distributed throughout San Diego, including, but not limited to, libraries, community meetings, and organizations benefiting LMI residents and areas. Efforts resulted in more than a six hundred percent (600%) increase in the number of surveys (1,357) received from the City's previous five-year plan.
- Multiple community forums were held to solicit a deeper level of citizen feedback. The forums were held in three low-to moderate-income communities and over 125 individuals participated. We developed appealing flyers notifying the public of various workshops and we leveraged local ties to enhance community participation.
- LDC community outreach work was complemented by multiple members of City Council.



2. UNITED WAY OF SAN DIEGO COUNTY

<u>Project Name:</u>	<u>Implementation of the Plan to End Chronic Homelessness</u>
<u>Municipality/Agency:</u>	United Way of San Diego County
<u>Location:</u>	San Diego County
<u>Client Project Manager:</u>	Shaina Gross Vice President, Impact Strategies and Mobilization (858) 636-4181 sgross@uwsd.org
<u>Consultant:</u>	LeSar Development Consultants
<u>LDC Project Manager(s):</u>	Jennifer LeSar Vicky Joes 619-236-0612 x 101 619-236-0612 x 102
<u>Project Cost:</u>	\$250,000
<u>Award and Completion Dates:</u>	May 2013 – June 2015 (ongoing)

Project Type and Scope of Services Provided:

- Building and strengthening partnerships with multiple agencies
- Strategic planning and community outreach
- Research on best practices and formation of policies and initiatives to address homelessness
- Drafting a monthly homelessness newsletter and managing social media platforms
- Outreach and presentations to advisory boards and executive teams
- Facilitation of major initiative and events such as the WeALLCount VIP deployment

LDC is implementing a strategic action plan for the United Way of San Diego County (UWSD) to effectively and efficiently reduce and ultimately end chronic homelessness across the San Diego region. As part of this work, LDC serves as the backbone organization and official coordinator for *The Campaign to End Homelessness in Downtown San Diego*. The mission of the Campaign is to change communities and lives by moving the most vulnerable members of the community off the streets and into permanent housing and linking them with rental assistance and supportive services. LDC has been successful in growing relationships and building a Leadership Team with more than 60 members, including key partners from the U.S Department of Veteran Affairs San Diego Healthcare System, the County and City of San Diego, and downtown business leaders.

Due to the Campaign's collective efforts, over 565 formerly homeless individuals have been taken off the streets and housed, and we are now working toward the institutionalization of resources and strategies to take the efforts to scale throughout the San Diego region. Additionally, LDC has grown UWSD's role as the regional leader on ending homelessness by conducting community outreach and educating stakeholders on best practices. LDC also leads UWSD efforts with funding agents such as Funders Together to End Homelessness San Diego, the 100K Homes 100 Day Campaign, and the Alliance for Regional Solutions.

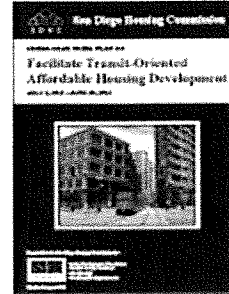
3. SAN DIEGO HOUSING COMMISSION

<u>Project Name:</u>	<u>Three Year Work Plan to Facilitate Transit Oriented Affordable Housing</u>
<u>Municipality/Agency:</u>	San Diego Housing Commission
<u>Location:</u>	San Diego City
<u>Client Project Manager:</u>	Deborah Ruane

Senior Vice President, Real Estate
 (619) 578-7566 | debbier@sdhc.org
 LeSar Development Consultants | ELP Advisors
 Jennifer LeSar | Vicky Joes
 619-236-0612 x 101 | 619-236-0612 x 102
 Project Cost: \$95,000
 Award and Completion Dates: January 2010 – October 2011 (ongoing)

Project Type and Scope of Services Provided:

- Creation of work and action plans
- Report writing, data collection, and board staff report preparation
- Strategic planning and stakeholder engagement
- Affordable housing TOD policy and planning



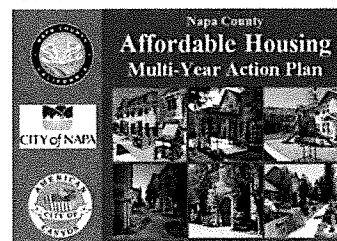
LDC has conducted real estate, financial, and housing policy and planning work for the San Diego Housing Commission (Housing Commission), the public agency which oversees affordable housing within the City of San Diego. Since 1981, the Housing Commission has contributed more than \$1 billion in loans and bond financing to projects that have produced 14,531 affordable rental units.

For this scope of work, LDC crafted the **Three-Year Work Plan to Facilitate Transit-Oriented Affordable Housing Development** for the Housing Commission. This strategic outreach plan included assistance identifying and establishing strategically important agency and individual relationships, identifying and structuring a workforce affordable housing strategy, and outlining best practices by entities engaged in transit-oriented development (TOD) to strengthen the Housing Commission’s ability to undertake TOD initiatives. Our affiliate and subconsultant, ELP Advisors, worked alongside LDC on outreach and stakeholder engagement activities, research, and report composition. The *Three Year Work Plan* was adopted by the San Diego Housing Commission in October 2011.

Since completion of the Plan, LDC has assisted with information dissemination activities, the pursuit of implementation financing, and guiding the City of San Diego with preparation of two \$5 million grant application submissions to HUD’s Sustainable Communities Regional Planning Grant Program.

4. THE COUNTY AND CITY OF NAPA

Project Name: Affordable Housing Task Force, a Multi-Year Action Plan
Municipality/Agency: Napa County | City of Napa
Location: Napa City and County
Client Project Manager: Larry Florin
 Director of Housing & Intergovernmental Affairs
 (707) 253-4621 | larry.florin@countyofnapa.org
Consultant: LeSar Development Consultants
LDC Project Managers: Jennifer LeSar
 619-236-0612 x 101
Project Cost: \$35,000
Award and Completion Dates: 2008 – February 2013
 (ongoing)



Project Type and Scope of Services Provided:

- Stakeholder engagement strategy development and implementation
- Stakeholder meeting/forum design and facilitation
- Creation of a work plan/action plan
- Report writing and board staff report preparation
- Trainings for City Council and Regional Affordable Housing Task Force

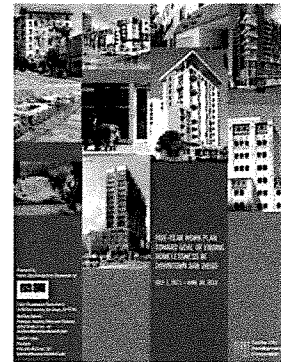
LDC drafted a **Multi-Year Action Plan** for the Napa Joint City/County Affordable Housing Task Force to help it prioritize its housing resources and create a five-year financial plan for how to best target housing investment in a declining economy. This involved facilitation of collaborative discussions and development of partnership relationships. LDC also completed a scope of services for both the City of Napa and Napa County to develop affordable housing lending program policies and procedures, underwriting guidelines, application process, and Notice of Funding Availability (NOFA), which entailed significant stakeholder input. The plan can be viewed here: <http://www.countyofnapa.org/WorkArea/DownloadAsset.aspx?id=4294979623>

5. CENTRE CITY DEVELOPMENT CORPORATION (NOW CIVIC SAN DIEGO)

<u>Project Name:</u>	Five Year Work Plan Toward the Goal of Ending Homelessness in Downtown San Diego
<u>Municipality/Agency:</u>	Centre City Development Corporation (Now Civic San Diego)
<u>Location:</u>	San Diego City
<u>Client Project Manager:</u>	Nancy Lytle Assistant President (619) 533-7173 lytle@civicsd.com
<u>Consultant:</u>	LeSar Development Consultants
<u>LDC Project Managers:</u>	Jennifer LeSar 619-236-0612 x 101
<u>Project Cost:</u>	\$235,000
<u>Award and Completion Dates:</u>	July 2010 – September 2011 (until dissolution of redevelopment)

Project Type and Scope of Services Provided:

- Creation of a work and action plan
- Report writing and board staff report preparation
- Strategic planning and stakeholder engagement
- Homelessness and affordable housing policy and planning
- Developed and managed the *Campaign to End Homelessness in Downtown San Diego*



Working closely with the Centre City Development Corporation (now Civic San Diego) and its partners, LDC prepared the **Five-Year Work Plan Toward Goal of Ending Homelessness in Downtown San Diego**. This plan is purposefully aligned with both *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness* and the *Plan to End Chronic Homelessness in the San Diego Region*. The *Five-Year Work Plan* analyzed housing and services gaps that must be addressed to effectively end unsheltered homelessness in the downtown area, and also projects the number of

permanent supportive housing opportunities necessary to fully meet the need for such housing among unsheltered persons.

The ***Five-Year Work Plan*** provides a structured work plan of action steps and tasks organized in five (5) strategic areas: Continue to expand the supply of Permanent Supportive Housing opportunities; Sustain and expand collaborations with regional partners and systems; Strengthen partnerships with housing and homelessness services agencies; Advance policy reforms at federal and state levels; Provide appropriate oversight and collect and report data to measure progress, refine strategies, and leverage additional resources. The work plan was adopted by the San Diego City Council in September 2011 and can be viewed here: http://svdpv.org/pdf/CCAC_HomelessnessWorkPlan_6-2-11.pdf.

Additional activities for this scope of work included the development and management of the *Campaign to End Homelessness in Downtown San Diego*, securement of commitments of funding from the Veteran's Administration, the County of San Diego, and the San Diego Housing Commission, plus all needed private resources to end homelessness for 125 households, and facilitation of monthly leadership team meetings and on-going community education and outreach.

ITEM D: PROPOSED FEE SCHEDULE

Please find the Item D: Proposed Fee Schedule enclosed under separate, sealed cover.

ITEM E: CONFLICT OF INTEREST

LDC certifies that there is no potential conflict of interest, financial or otherwise, regarding its involvement with the development of this response to the RFP or its scope of services. LDC does not have a financial, business, or other relationship with the City of Porterville, any member of City staff or its elected officials, that may have an impact on the outcome of the project. LDC does not have any current clients who have a financial interest in the outcome of the project.

ITEM F: ADDITIONAL REQUIRED DOCUMENTS

This section includes the following required documents:

- Exhibit B-1: Non-Collusion Affidavit
- Exhibit B-2: Workers' Compensation Insurance Certificate
- Exhibit B-3: Equal Employment Opportunity Compliance Certificate
- Exhibit B-4: City of Porterville Ownership Disclosure for Contractors and Consultants
- Exhibit B-5: Drug-Free Workplace Certification
- Exhibit B-6: City of Porterville Certification of Section 3 Business Concern

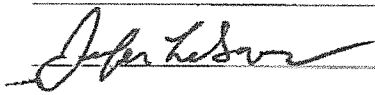
Exhibit "B-2"
WORKERS' COMPENSATION INSURANCE CERTIFICATE
To Accompany Bid Form

STATE OF CALIFORNIA)
) ss
CITY OF PORTERVILLE)
COUNTY OF TULARE)

I am aware of the provisions of Section 3700 of the Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work under this contract.

Company: LeSar Development Consultants

Business Address: 2410 1st Ave, San Diego, CA 92101

Signature: 

Name of Signing Official: Jennifer LeSar

Title of Signing Official: President and CEO

Date: June 17, 2014

Company Seal:



Exhibit "B-3"
EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE CERTIFICATE
To Accompany Bid Form

Equal Opportunity Clause

Unless exempted by rules, regulations or orders of the Secretary of Labor issued pursuant to Executive Orders 28925, 11114 or Section 204 of Executive Order 11246 of September 24, 1965, during the performance of each contract with the City of Porterville, the contractor agrees as follows:

1. The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, gender, national origin or political affiliation. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, gender, national origin or political affiliation. Such action shall include, but not be limited to, the following: employment upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
2. The contractor will, in all solicitations or advertisements for employees, placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin or political affiliation.
3. The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided by the agency contracting officer, advising the labor union or the workers' representative of the contractors' commitments under Section 202 of Executive order 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
4. The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and the rules, regulations and relevancy orders of the Secretary of Labor.
5. The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by the rules, regulations and relevant orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
6. In the event of the contractor's non-compliance with the non-discrimination clauses of this subcontract or with any of such rules, regulations or orders, this subcontract may be canceled, terminated or suspended, in whole, or in part and the contractor may be declared ineligible for further government contracts in accordance with the procedures authorized in accordance with Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation or order of the Secretary of Labor, or otherwise provided by law.
7. The contractor will include the provisions of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each Subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the contracting agency may direct as a means of enforcing such provisions including sanctions for non-compliance. Provided, however, that in the event the contractor becomes involved in, or is threatened with litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

Certification on Non-Segregated Facilities

The contractor hereby certifies that it does not or will not maintain segregated facilities nor permit its employees to work at locations where facilities are segregated on the basis of race, color, religion, gender, national origin or political affiliation.

LeSar Development Consultants

Name of Firm


Authorized Signature

June 17, 2014

Date

Exhibit "B-4"
CITY OF PORTERVILLE
Ownership Disclosure for Contractors and Consultants
To Accompany Proposal

NAMES OF PRINCIPALS, PARTNERS, AND/OR TRUSTEES

Firm Name: LeSar Development Consultants

Firm Address: 2410 1st Ave, San Diego, CA 92101

List the names of all principals, partners, and/or trustees. For corporations provide names of officers, directors and all stockholders owning more than 10% equity interest in corporation:
Jennifer LeSar – President and CEO -- 100% Ownership

Submitted by: Name Jennifer LeSar, President and CEO, LeSar Development Consultants

Date June 17, 2014

Exhibit "B-5"

STATE OF CALIFORNIA
DRUG-FREE WORKPLACE CERTIFICATION
STD.21 (REV.12-93)


To Accompany Proposal
CERTIFICATION

I, the official named below, hereby swear that I am duly authorized legally to bind the contractor or grant recipient to the certification described below. I am fully aware that this certification, executed on the date below, is made under penalty of perjury under the laws of the State of California.

CONTRACTOR/BIDDER FIRM NAME
FEDERAL ID NUMBER
BY (Authorized Signature)
DATE EXECUTED
PRINTED NAME AND TITLE OF PERSON SIGNING TELEPHONE NUMBER (Include Area Code)
TITLE
CONTRACTOR/BIDDER FIRM'S MAILING ADDRESS

The contractor or grant recipient named above hereby certifies compliance with Government Code Section 8355 in matters relating to providing a drug-free workplace. The above named contractor or grant recipient will:

1. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations, as required by Government Code Section 8355(a).
2. Establish a Drug-Free Awareness Program as required by Government Code Section 8355(b), to inform employees about all of the following:
 - (a) The dangers of drug abuse in the workplace,
 - (b) The person's or organization's policy of maintaining a drug-free workplace,
 - (c) Any available counseling, rehabilitation and employee assistance programs, and
 - (d) Penalties that may be imposed upon employees for drug abuse violations.
3. Provide as required by Government Code Section 8355©, that every employee who works on the proposed contract or grant:
 - (a) Will receive a copy of the company's drug-free workplace policy statement, and
 - (b) Will agree to abide by the terms of the company's statement as a condition of employment on the contract or grant.
4. At the election of the contractor or grantee, from and after the "Date Executed" and until _____ (NOT TO EXCEED 36 MONTHS), the state will regard this certificate as valid for all contracts or grants entered into between the contractor or grantee and this state agency without requiring the contractor or grantee to provide a new and individual certificate for each contract or grant. If the contractor or grantee elects to fill in the blank date, then the terms and conditions of this certificate shall have the same force, meaning effect and enforceability as if a certificate were separately, specifically, and individually provided for each contract or grant between the contractor or grantee and this state agency.

Contractor/Firm Name: LeSar Development Consultants
Federal ID Number: 20-3468767
By (Signature): 
Date Executed: June 17, 2014
Printed Name and Title of Signer: Jennifer LeSar, President and CEO
Contractor/Bidder Phone Number and Address: 619.236.0612, ext.102

2410 1st Ave.
San Diego, CA 92101

ITEM G: APPENDIX A

ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) **01/29/2014**

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policy(ies) may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Stromsoe Insurance Agency 24910 Las Brisas Road, Ste 117 Murrieta, CA 92562 License #: 0D06577	CONTACT NAME: Tamara Richardson PHONE: (951)699-5751 FAX: (951)677-6265 E-MAIL: insure@slainline.com INSURER(S) AFFORDING COVERAGE:
INSURED: LeSar Development Consultants 2410 1st Ave San Diego, CA 92101	INSURER A: Golden Eagle Insurance Corp INSURER B: United Financial Casualty Co(Prog) 11770 INSURER C: Valley Forge Insurance Company (CNA) 20427 INSURER D: INSURER E: INSURER F:

COVERAGES CERTIFICATE NUMBER: 00015031-685750 REVISION NUMBER: 2

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

CLASS	TYPE OF INSURANCE	POLICY NUMBER	POLICY PERIOD (MM/DD/YYYY)	EXPIRES (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAMS-MADE <input checked="" type="checkbox"/> OCCUR	CBP3939283	07/19/2013	07/19/2014	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 100,000 MED. EXP. (Per one person) \$ 5,000 PERSONAL & ADV. INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMBOP. ADD. \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PER. <input type="checkbox"/> LOC.				
B	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS <input checked="" type="checkbox"/> Hired AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	07571438-3	08/09/2013	08/09/2014	COMBINED SINGLE LIMIT (Per accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per person) \$ EACH OCCURRENCE \$ AGGREGATE \$
	UMBRELLA LIAB. <input type="checkbox"/> OCCUR EXCESS LIAB. <input type="checkbox"/> CLAMS-MADE				EACH OCCURRENCE \$ AGGREGATE \$
C	EMPLOYERS' COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NE) <input type="checkbox"/> Form description under EXPOSITION OF OPERATIONS tab.	4017868538	12/01/2013	12/01/2014	<input checked="" type="checkbox"/> NO STAFF-TOWNSHIP LIMITS <input type="checkbox"/> OTHER \$ E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
	T/N N/A				

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 99, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER Proof of insurance	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>T. Richardson</i> (TRR)
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ITEM D: PROPOSED FEE SCHEDULE

Task	Deliverable	Aug-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jul-15	Aug-15	Sep-15	Nov-15	Dec-15	Total
1.1	Kick-off Meeting and Engagement Planning	\$2,965													\$2,965
2.1	Public Participation Survey		\$5,460												\$5,460
2.2	Community Engagement Plan, Meetings and Consultations		\$9,105												\$9,105
2.3	First Draft Analysis of Impediments			\$8,725											\$8,725
2.4	First Draft Needs Assessment and Market Analysis				\$9,525										\$9,525
3.1	Final Draft Analysis of Impediments					\$2,885									\$2,885
3.2	75% Draft Consolidated Plan						\$7,075								\$7,075
3.3	First Draft Citizen Participation Plan						\$1,530								\$1,530
3.4	First Draft Strategic Plan and Action Plan							\$10,000							\$10,000
3.5	Final Draft Citizen Participation Plan							\$1,325							\$1,325
3.6	Final Draft Strategic Plan and Action Plan								\$2,225						\$2,225
3.7	100% Final Draft Consolidated Plan								\$2,570						\$2,570
3.8	Consolidated Plan Public Comments, Hearing and Adoption									\$2,385					\$2,385
3.9	Final Consolidated Plan for Upload to IDIS										\$2,285				\$2,285
3.10	75% Draft Housing Element**										\$7,105				\$7,105
3.11	100% Final Draft Housing Element**											\$5,175			\$5,175
3.12	Housing Element Public Comments, Hearing and Adoption**												\$3,285		\$3,285
3.13	Final Housing Element for Submission to HCD**													\$8,125	\$8,125
4.1	Technical Support and Guidance to City Staff													\$2,375	\$2,375
Total		\$2,965	\$14,565	\$8,725	\$9,525	\$2,885	\$8,605	\$11,325	\$4,795	\$2,385	\$9,390	\$5,175	\$3,285	\$10,500	\$94,125

Exhibit B

* These budget projections are all-inclusive of labor, printing, and transportation costs.
 ** Housing Element deliverables can be submitted concurrently with Consolidated Plan deliverables.