



Request for Proposals
For Preparation of a
Historical Resources Relocation Feasibility Study

Distribution/Advertisement: Wednesday, August 12, 2009
Presubmittal Meeting: Thursday, August 20, 2009 at 2:00 p.m.
Submittal Deadline: Friday, September 11, 2009 by 4:30 p.m.

Contact: Lucy Contreras, Associate Planner
Centre City Development Corporation
401 B Street, Suite 400
San Diego, CA 92101
619-533-7140
www.ccdc.com

Advertisement

REQUEST FOR PROPOSALS FOR PREPARATION OF A HISTORICAL RESOURCES RELOCATION FEASIBILITY STUDY

Centre City Development Corporation (CCDC), an equal opportunity contractor, is requesting proposals from firms to assist with the preparation of a Historical Resources Relocation Feasibility Study to evaluate the establishment of a “relocation area” for threatened designated resources within the Downtown Community Plan area. Subconsultant opportunities could include the following disciplines: historical resources preservation (including expertise in relocation, rehabilitation and adaptive re-use) and financial/ economic consultants.

Proposals from small businesses, disabled veteran-owned businesses, women-owned businesses, firms owned by underrepresented ethnic groups and local firms are encouraged. Equal Opportunity forms are available from Charlene McAdory at mcadory@ccdc.com.

There will be a presubmittal meeting on Thursday, August 20, 2009, at 2:00 p.m. at CCDC, located at 401 B Street, Suite 400, San Diego, CA 92101. This meeting will provide opportunities for project teams to discuss all aspects of the solicitation process, ask questions and for subconsultants to network with prime consultants.

Deadline to submit a response is Friday, September 11, 2009, by 4:30 p.m. Solicitation text and attachments can be downloaded from CCDC's Web site at www.ccdc.com (click on Business Opportunities, RFPs and RFQs, current RFPs and RFQs) or can be picked up at CCDC (401 B Street, Suite 400, San Diego, CA 92101). Questions, please contact Lucy Contreras, Associate Planner at contreras@ccdc.com or 619-533-7132.

**Responses submitted by email and/or fax shall not be deemed as received.*

There may be additional informational postings related to this Request for Proposals. Respondents are required to monitor CCDC's website to track postings at www.ccdc.com.

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1.0 INTRODUCTION

Centre City Development Corporation (CCDC) is a public, nonprofit agency created by the City of San Diego (“City”) in 1975 to implement downtown redevelopment activities. CCDC functions pursuant to an Operating Agreement with the City of San Diego Redevelopment Agency (“Agency”) and is responsible for a wide range of activities affecting downtown, such as planning, zoning administration, property acquisition and disposition to eliminate blight and revitalize downtown San Diego. CCDC also works with qualified developers, property owners and other public agencies concerning rehabilitation projects, new construction and public improvements.

1.1 Purpose of Solicitation

CCDC is requesting proposals from firms to prepare a historical resources relocation feasibility study to evaluate the establishment of a “relocation area” for threatened designated resources within the Downtown Community Plan area. Subconsultant opportunities could include the following disciplines: historical resources preservation (including expertise in relocation, rehabilitation and adaptive re-use) and financial/ economic consultants.

1.2 Overview of Solicitation

This solicitation is composed of the following parts:

INTRODUCTION (Section 1.0)

This section introduces information about CCDC, including a brief history of the Corporation. It also introduces the purpose of this solicitation with pertinent details, rules and regulations to follow in subsequent sections and appendices. The respondent is advised to review the entire solicitation before preparing a submittal.

SUBMITTAL REQUIREMENTS (Section 2.0)

This section introduces detailed instructions on how to prepare a submittal. Additional details may be contained in subsequent sections and appendices. Questions arising during preparation of a submittal should be addressed to the designated project manager, whose contact information appears on the title page of this solicitation.

SELECTION PROCESS AND EVALUATION CRITERIA (Section 3.0)

This section explains how proposals will be evaluated, ranked and selected.

DECLARATIONS AND ADDITIONAL INFORMATION (Section 4.0)

This section contains important declarations and additional information the respondent must carefully review. Items include, but are not limited to prerequisites, special conditions, policies, guidelines and requirements that will be incorporated into the Scope of Services and/or contract.

APPENDICES (Section 5.0)

This section contains appendices which include, but are not limited to the Scope of Services, sample contract, Equal Opportunity Program requirements, and guidance on project specifics necessary to compile a complete submittal. Again—the respondent is encouraged to review the entire solicitation before preparing a submittal.

2.0 SUBMITTAL REQUIREMENTS

This section contains instructions on how to prepare and submit a response to this solicitation. Questions arising during preparation of a submittal shall be addressed only to the designated project manager.

The respondent shall follow the format specified below. The contents of the submittal must be clear, concise and complete. Each section of the submittal shall be tabbed and labeled in the order shown below.

2.1 Submittal Cover

The submittal cover shall include the title, submittal due date, name, address, telephone and fax numbers, and e-mail address of the principal contact.

2.2 Table of Contents

The table of contents shall be complete and clear, listing headings and pages to enable easy reference.

2.3 Cover Letter

The cover letter shall be one page. Any changes to the submittal format or deletions of requested material should be explained in the cover letter.

Additional cover letter information:

- Identify the respondent's primary contact (include address, e-mail address and telephone number), responsible for all queries made during the intake and processing of the response.
- Identify the location of the office(s) housing individuals assigned to provide services.
- Provide the pertinent Federal Tax I.D. number.
- If proposing joint venture partners and subs, include company name(s), the types of services to be provided by each, and the primary contact for each.
- The signatory shall be a person with legal authority to bind the prime, partners and subs.

2.4 Statement of Understanding and Methodology

The statement of understanding and methodology shall contain a written narrative that demonstrates the respondent understands the solicitation and a methodology for implementing the Scope of Services. The Scope of Services is attached as Appendix A.

2.5 Project-Related Experience

This section shall include examples of the respondent's experience in the past five years specifically related to the Scope of Services. Examples shall be listed consecutively and the awarding and completion dates noted for each. For each listing, include the name(s) and telephone number(s) of the respondent's project manager and the client's project manager. When

listing prime, joint venture partners and subcontractors, provide examples in the same manner described herein.

2.6 Project Personnel

This section shall identify the contact person with primary responsibility for this project, the personnel proposed to work on this project, and joint venture partners and subs. The persons listed will be considered committed to the project with no substitutions without prior agreement with CCDC. A résumé for each prime professional assigned to the project shall be submitted (subconsultants résumé are not needed). The résumés shall include at least three references from previous assignments with telephone numbers and e-mail addresses.

2.7 Organization Chart

This section shall include an organization chart containing the names of all key personnel, joint venture partners, and subs with titles and their specific task assignment for this contract.

2.8 Insurance

This section shall include proof of insurance as required under the terms of the contract.

See also Appendix B, B.1 – Sample Contract – Section 306.

2.9 Schedule of Rates

CCDC needs one Fixed Fee proposal and one “Schedule of Rates” in a sealed envelope that shall be attached to the original solicitation. The schedule of rates shall include rates for all project personnel of the prime consultant, joint venture partner(s), and sub-consultants.

2.10 Additional Required Documents

This section shall include required documents (documents that must be filled out and returned with response) not requested in other sections of the submittal:

From Appendix C

- Attachment C.3 – Equal Opportunity Agreement
- Attachment C.6 – Work Force Report
- Attachment C.7 – Sub Consultant and Vendor List
- Attachment C.8 – Letter of Intent to Sub-contract or Co-venture
- Attachment C.9 – Outreach Survey

From Appendix D

- Attachment D.2 – Disclosure Statement
- Attachment D.3 – Tentative Contract Revisions

3.0 SELECTION PROCESS AND EVALUATION CRITERIA

3.1 Selection Criteria

Respondents shall ***carefully review*** Appendix D, Additional Project Documents, Attachment D.1 – Selection Criteria.

3.2 Submittal Selection Process

A Selection Committee will review the submittals and "short-list" the most qualified respondents utilizing the Selection Criteria Form. Then, an Interview Panel will be formed to interview selected respondents. It is mandatory that the designated lead contact from the prime, joint venture partner(s), and subconsultant(s) attend. Short-listed respondents will be given at least five working days to prepare for the interview.

3.3 Presubmittal Meeting

A presubmittal meeting has been scheduled for August 20, 2009 at 2:00 p.m. at CCDC's office, located at 401 B Street, Suite 400, San Diego, California 92101. This meeting will provide opportunities for project personnel to discuss all aspects of the solicitation process, ask questions, and for subconsultants to network with prime consultants.

3.4 Submittal Schedule

The solicitation, submittal intake, evaluation, and final selection will conform to the following schedule. **Note: Dates are subject to change.**

Distribution/Advertisement	Wednesday, August 12, 2009
Presubmittal Meeting	Thursday, August 20, 2009 at 2:00 p.m.
Deadline for Submittal	Friday, September 11, 2009 by 4:30 p.m.
Submittal Evaluation and Short List	TBD
Interviews (tentatively)	TBD
Contract Negotiation	TBD
Board Disclosure	October 21, 2009

3.5 Submittal Deadline and Project Manager

The respondent shall submit one bound original, four copies, and one "high quality" digital PDF file (on CD) delivered no later than:

Friday, September 11, 2009 by 4:30 p.m. to:
Lucy Contreras, Associate Planner
CCDC, 401 B Street, Suite 400, San Diego, CA 92101

The respondent understands that incomplete submittals, incorrect information, or late submittals shall be cause for disqualification. Copies received by e-mail and/or fax shall **not** be deemed as received.

4.0 DECLARATIONS AND ADDITIONAL INFORMATION

4.1 CCDC Rights Pertinent to This Solicitation

CCDC reserves the right to reject all submittals for any reason without indicating reasons for said rejection.

CCDC reserves the right to amend this solicitation by addendum. CCDC is bound only by what is expressly stated in this solicitation and any authorized written addenda thereto. Addenda will be posted on CCDC's Web site at www.ccdc.com. It shall be the consultant's responsibility to check the Web site up to the final submittal date daily for any possible addenda.

CCDC accepts no financial responsibility for any costs incurred by the respondent. All submittals become the property of CCDC and may be used in any way deemed appropriate.

Submittals will be considered valid for 120 days after submittal deadline.

4.2 Withdrawal of Solicitation

CCDC reserves the right to withdraw this solicitation at any time without prior notice and makes no representation that any agreement will be awarded to any respondent. Additionally, CCDC expressly reserves the right to postpone opening responses to this solicitation for its own convenience, and/or to waive any informality or irregularity in the responses received.

4.3 Compensation

The respondent agrees, if selected, that compensation shall remain firm and fixed throughout the term of the contract.

See also Appendix B, Sample Contract – Section 104.

4.4 Contact with CCDC Personnel

Questions regarding this solicitation shall be directed **only** to:

Lucy Contreras, Associate Planner (619) 533-7132 or contreras@ccdc.com .

4.5 Formal Approval of Contract

The respondent understands that issuance of this solicitation does not commit CCDC to award a contract, to pay any costs incurred in the preparation of a response to this solicitation, or to procure a contract for services. The respondent should note that the execution of any contract pursuant to this solicitation is dependent upon the approval of CCDC Board of Directors, Redevelopment Agency and/or San Diego City Council, or CCDC Executive Vice President/CFO, as required.

4.6 Independent Contractor Status

The respondent agrees, if selected, that he or she shall perform the services as independent contractor(s) and not employee(s) of CCDC or the City. Neither CCDC nor the City will be considered the employer or joint employer of, or with the officer(s), employee(s), or agent(s) of, the respondent. The respondent understands, if selected, the respondent shall have the sole responsibility for deciding the manner and means of providing the services, except as outlined in the final contract and its attachments or exhibits. In such instances that the respondent acts as a designated agent for CCDC for the purpose of conducting public hearings or permit acquisition, the respondent shall sign a letter of authorization provided by the governing agency (e.g., water board, planning department).

4.7 CCDC Quality Assurance Process

The respondent understands that upon contract award, CCDC will evaluate performance on a periodic basis. Such evaluation will include assessing compliance with all terms stated in the contract and the Scope of Services. If deficiencies are determined a report will be generated outlining improvement methods and corrective actions. If improvement does not occur, CCDC may terminate the contract, in whole, or in part, or impose other penalties as specified in the contract.

4.8 Public Disclosure

The respondent understands that as a general rule all documents received by CCDC are considered public records. Therefore all submittals shall be made available for public inspection according to applicable disclosure rules and regulations. If the respondent considers his or her submittal as proprietary and/or otherwise exempt from disclosure he or she must submit a written request for a determination of whether the documents can be withheld from public disclosure no later than 15 days prior to the due date of the submittal. CCDC legal counsel will make a determination of confidentiality. If a determination is not obtained prior to the submittal deadline, all document(s) shall be subject to public disclosure.

4.9 Confidential Solicitation

The CCDC will not share the details of individual responses to this solicitation with competing respondents during the selection process. After the selection process ends and prior to legislative action on the contract, all solicitations become public information (except portions otherwise deemed confidential as noted in Section 4.8).

4.10 News Releases

The respondent agrees that, if selected, CCDC will review and approve all news releases pertaining to this solicitation and/or subsequent agreement(s). All news releases will be submitted in writing to the CCDC project manager. The project manager will review and submit the news release to the appropriate CCDC personnel for final review and approval in a timely manner.

4.11 Conflict of Interest/Financial Disclosure

The respondent agrees, if selected, to comply with CCDC's duly adopted Conflict of Interest Code. Key personnel who will be performing services under this Agreement are required to make disclosures with respect to the Centre City and Horton Plaza Redevelopment Project Areas.

See also Appendix B, Sample Contract – Sections 304 and 305.

4.12 Indemnification

The respondent agrees, if selected, to indemnify and hold harmless Centre City Development Corporation, the Redevelopment Agency of the City of San Diego, the City of San Diego and all officers and employees of each entity from any and all liability, claims, costs (including reasonable attorneys' fees), demands, damages, expenses, and causes of action as outlined in the contract.

See also Appendix B, Sample Contract – Section 307.

4.13 Examination of Solicitation

The respondent understands that the information provided herein is intended solely to assist the respondent in submittal preparation. To the best of CCDC's knowledge, the information provided is accurate. However, CCDC does not warrant such accuracy, and any errors or omissions subsequently determined will not be construed as a basis for invalidating this solicitation. Further, by submitting a response to this solicitation, the respondent represents that he or she has thoroughly examined and become familiar with work required in the solicitation and is capable of performing quality work and to achieve the objectives of CCDC.

4.14 Equal Opportunity Program

The City of San Diego and CCDC are strongly committed to equal opportunity in solicitation of services. All eligible service providers including individuals, contractors, vendors, consultants, grantees, lessees, and banks, must comply with CCDC's Equal Opportunity Policy and Program.

See also Appendix C, Equal Opportunity Program/documents.

4.15 Nondiscrimination Policy

The respondent shall not discriminate on the basis of race, gender, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring or treatment of subs, vendors, or suppliers. The respondent shall provide equal opportunity for subs to participate in subcontracting opportunities. The respondent understands and agrees that violation of this clause shall be considered a material breach of the contract and may result in contract termination, debarment, or other sanctions.

4.16 Local Business and Employment

The respondent acknowledges that CCDC seeks to promote employment and business opportunities for local residents and firms on all CCDC contracts. The respondent shall, to the extent legally possible, solicit applications for employment and proposals for subcontracts for work associated with this document from local residents and firms as opportunities occur. The respondent agrees to hire qualified local residents and firms whenever feasible.

5.0 APPENDICES

Appendix A – Scope of Services

Attachment A.1 – Scope of Services

Appendix B – Sample Contract

Attachment B.1 – Sample Contract

Appendix C – Equal Opportunity

Attachment C.1 – CCDC Equal Opportunity Policy

Attachment C.2 – Equal Employment Outreach Program

Attachment C.3 – Equal Opportunity Agreement

Attachment C.4 – Advisory Goals and Guidelines

Attachment C.5 – Strategies for Successful Team

Attachment C.6 – Work Force Report

Attachment C.7 – Sub Consultant and Vendor List

Attachment C.8 – Letter of Intent to Sub-contract or Co-venture

Attachment C.9 – Outreach Survey

Appendix D – Additional Project Documents

Attachment D.1 – Selection Criteria

Attachment D.2 – Disclosure Statement

Attachment D.3 – Tentative Contract Revisions



Appendix A – Scope of Services

Attachment A.1 – Scope of Services

The Centre City Development Corporation (CCDC) is a public, nonprofit agency created by the City of San Diego in 1975 to implement downtown redevelopment activities. CCDC functions pursuant to an operating agreement with the City of San Diego Redevelopment Agency (Agency) and is responsible for a wide range of activities affecting downtown including planning, zoning administration, property acquisition and disposition to eliminate blight. CCDC also works with qualified developers and property owners concerning rehabilitation projects, new construction and public improvements.

Some of the most exciting opportunities and challenges in downtown involve integrating pieces of the past into the future, while facilitating the dynamics of an evolving contemporary high-intensity center. In order to encourage the preservation and integration of historical resources into the downtown fabric, while achieving development and population targets, CCDC is seeking a qualified firm to assist in the development of a Historical Resources Relocation Feasibility Study. The study will evaluate the feasibility of, and issues associated with, establishing a “Relocation Area” for designated historical resources within the Downtown Community Plan area that are threatened with demolition and/or outside relocation due to redevelopment activities. The feasibility study would examine the establishment of such an area generally located on 17th Street between G and J streets (see attached study area boundary map). The study may evaluate various factors, including but not limited to:

1. Existing designated and potential historical resources within the study area
2. Ownership of properties within the designated area
3. The effect of existing FAR’s and development potential of proposed site/area
4. Number of properties (number and size of individual parcels)
5. Potential acquisition by the Redevelopment Agency of non-historic properties within the area to establish relocation sites
6. Potential costs of acquisition, and holding of, properties
7. Methods of future disposition of such properties by the Agency
8. Potential use of these properties for the relocation of historical resources
9. Evaluate designation of the area as a sending site to allow the Transfer of Development Rights (TDR) program to apply to the area.
10. Potential feasibility, and costs associated with the relocation of various types of structures

CCDC will provide the selected firm with the following:

- Existing potential historical resource survey information
- Ownership and land use information for each parcel within the study area
- Development potential of properties without resources present
- Estimated valuation of land
- Potential relocation costs of existing land uses (commercial and residential) from study area

Consultant tasks and deliverables are outlined below:

1. Review Background Material

- Review relevant materials including the Downtown Community Plan, the Centre City Planned District Ordinance (PDO) and Historical Resources Regulations of the City of San Diego.
- Prepare a schedule of tasks, meetings and milestones for deliverables.

2. Data Collection and Analysis

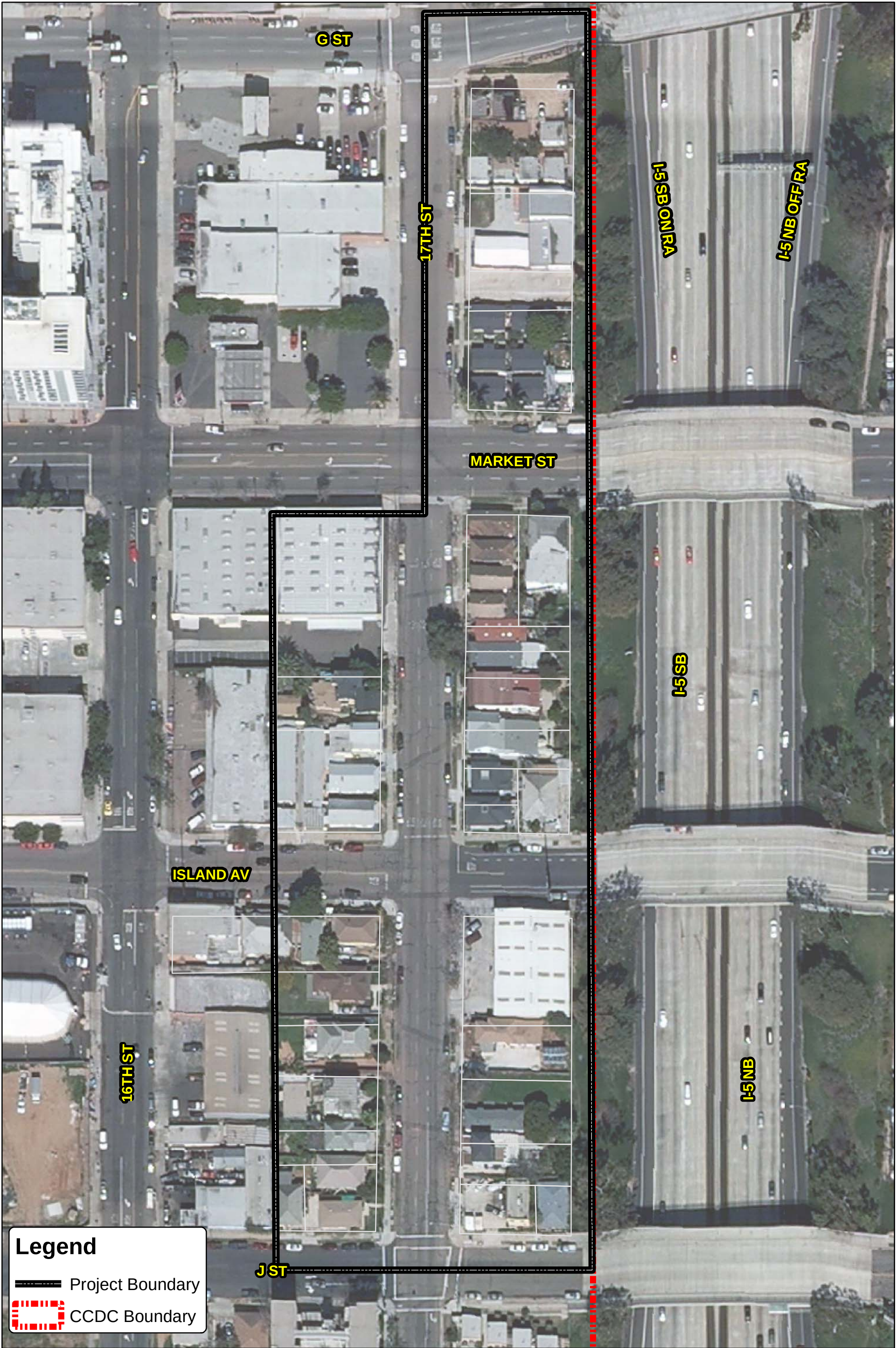
- Gather supplemental data and evaluate existing structures for significance (preparation of Department of Recreation (DPR) forms and/or documents for preliminary review for properties over 45 years of age)
- Review national best practices in the facilitation of the relocation and protection of historical resources.
- Research and evaluate alternative methods of relocation and ownership
- Study the proposed project area and recommend boundaries.
- Study the potential costs of acquiring real property versus protective covenants on properties
- Evaluate the use of Mills Act, rehabilitation loans, TDR's and other financial incentives.

3. Meeting Participation and Approval Process

- Participate in monthly meetings with CCDC staff
- Participate in at least three public meetings during the final phase of the process (Centre City Advisory Committee, CCDC Real Estate Committee, and CCDC Board), to gain approval of the final deliverables from these entities.
- Prepare power point presentations and written reports for public meetings

4. Deliverables

- Regular agendas and meeting minutes
- Power point presentations
- A monthly status report
- Case studies/best practices of other jurisdictions
- Historical reports (DPR forms/Preliminary Review) for structures over 45 years of age and/or identified on historical surveys
- A 50% complete report, a draft final report, and a final report
- Digital files of all deliverable materials that are web and print ready



Legend

-  Project Boundary
-  CCDC Boundary



Appendix B – Sample Contract

Attachment B.1 – Sample Contract

CENTRE CITY DEVELOPMENT CORPORATION
AGREEMENT FOR _____ SERVICES
WITH
ABC CONSULTING, INC.

THIS AGREEMENT is entered into this _____ day of _____,
2009

between the "Corporation": CENTRE CITY DEVELOPMENT CORPORATION
401 B Street Suite 400
San Diego, CA 92101
Telephone: (619) 235-2200
Facsimile: (619) 236-9148

(a non-profit public benefit corporation acting pursuant to the powers granted to it in the Operating Agreement between the Redevelopment Agency of the City of San Diego and the Centre City Development Corporation)

and the "Consultant ": ABC CONSULTING, INC.
123 Main Street, Suite 100
San Diego, CA 92108
Telephone: (619) 123-4567
Facsimile: (619) 123-4567

101. DESCRIPTION OF WORK

Consultant shall provide _____ services for the Corporation as more specifically described in Agreement Attachment No. 1, Scope of Services.

102. AGREEMENT ATTACHMENTS

The above services shall be performed in accordance with the following listed documents, which are attached hereto and made a part hereof:

1. Scope of Services, Agreement Attachment No. 1
2. General Provisions, Agreement Attachment No. 2
3. Corporation Sexual Harassment Policy, Agreement Attachment No. 3
4. Fee Schedule, Agreement Attachment No. 4
5. Subconsultant List, Agreement Attachment No. 5 (if applicable)
6. Insurance Certificate(s) and Endorsements, Section 306 submitted separately

103. TIME OF PERFORMANCE

All services required pursuant to this Agreement shall commence when and as directed by the Corporation in writing and shall be completed within such times as are reasonably established by the Corporation as set forth in the Scope of Services, Agreement Attachment No. 1. Time is of the essence with respect to each and every term and provision of the Agreement. Consultant may proceed with specific work tasks based on written or verbal authorization to proceed from the Corporation. However, any verbal authorization must be substantiated in writing by the Corporation within five (5) working days.

104. COMPENSATION AND BILLABLE TIME

a. Maximum Compensation

The total compensation for all services performed pursuant to this Agreement shall not exceed the sum of _____ DOLLARS (\$_____). Payments to the Consultant for all services will be based on hourly rates and reimbursable expenses incurred, as described in Agreement Attachment No. 4 and shall not exceed the amount listed above without prior written approval from the Corporation. Consultant acknowledges that Corporation is under no obligation to compensate the Consultant for services rendered or expenses accrued under this Agreement in excess of the total compensation specified above. It shall be the responsibility of the Consultant to monitor its activities to ensure that the Scope of Services specified in Agreement Attachment No. 1 can be completed and no charges accrued in excess of the agreed total compensation without prior written approval during the term of this Agreement.

b. Additional Services

When the Corporation requests the Consultant to provide services not specified in the Scope of Services, the Corporation and the Consultant shall establish a mutually acceptable budget and schedule of performance for said services. The compensation for said services shall be funded either by transfer of allocated budget from a specified service item or an increase in the Consultant's total compensation.

c. Expenses

In connection with services performed under this Agreement, the Consultant shall pay for all direct out-of-pocket expenses and such expenses as are necessary for the timely completion of the work including, but not limited to, the cost of personnel, equipment, transportation, subcontracts, overtime premium, and Agreement administration. Said expenses are to be included in the authorized maximum compensation.

d. Direct Costs

The maximum compensation listed above includes special computer services requested by the Corporation, printing, reproductions, copies, duplicating, and travel costs expressly requested by the Corporation and/or necessitated by virtue of the scope of services set forth in Agreement Attachment No. 1.

e. Method of Payment

The Consultant and subconsultant shall submit, in duplicate, a monthly requisition to the Corporation specifying the amount due for services performed by both personnel staff. Such requisition shall:

1. For each invoice, itemize in the following matter:
 - (a) Reference the Agreement number assigned hereto: AC
 - (b) Reference the tasks as identified in the scope of services;
 - (c) Described the work performed;
 - (d) Identify personnel, the number of hours worked and assigned billing rates;
 - (e) For travel time, identify personnel, the date(s) of travel, the locations and times of departure and arrival, the total number of hours of travel time, and the assigned billing rates;
 - (f) Identify the Corporation's project manager;
 - (g) Indicate the total expenditures for each project and accumulated total;
 - (h) Itemized receipt; and
 - (i) No credit card bill accepted
2. For reimbursable expenses, the Consultant shall submit with the monthly requisition copies of both invoices listing the Consultant's and Subconsultants reimbursable expenses and receipts documenting all eligible reimbursable expenses.
3. For approved additional hourly services, specify the position and title of each staff member and number of hours worked on said services during the past month.
4. For consultant and subconsultants invoicing, specify the position and title of each staff member, the number of hours worked on said services during the past month, and the amount due to each subconsultant, designating (where applicable) if the firm is a Minority Business Enterprise (MBE), Woman Business Enterprise (WBE), Small Business Enterprise (SBE), Disadvantaged Business Enterprise (DBE) or Disadvantaged Veterans Business Enterprise (DVBE).

Such monthly requisition for payment shall contain a certification by the Consultant specifying payment requested is for work performed in accordance with the provisions of this Agreement. Upon approval of the requisition, the Corporation shall make payment of approved requisition within 30 days. Payments will be made to the Consultant at the address given above.

105. NOTICES

Notices to the parties shall, unless otherwise requested in writing, be sent to the Corporation and the Consultant at the addresses given above.

106. COUNTERPARTS

This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all which together shall constitute one and the same agreement.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed on the day and year first above written.

CENTRE CITY DEVELOPMENT CORPORATION

By: _____
Frank J. Alessi, Executive Vice President and
Chief Financial Officer

Date: _____

ABC CONSULTING, INC.

By: _____

Print Name: _____

Date: _____

APPROVED:

LAW OFFICES OF
BEST BEST & KREIGER LLP

By: _____
Shawn D. Hagerty, Legal Counsel
Centre City Development Corporation

Date: _____

AGREEMENT ATTACHMENT NO. 1
SCOPE OF SERVICES
SAMPLE FORMAT

200. When and as directed by the Corporation, the Consultant shall perform services including, but not limited to the following:

AGREEMENT ATTACHMENT NO. 2 GENERAL PROVISIONS

300. GENERAL PROVISIONS

301. Status of Consultant

This Agreement calls for the performance of the services of the Consultant as an independent Consultant ("Consultant") of Centre City Development Corporation ("Corporation"). The Consultant is not and shall not be considered an employee of the Corporation for any purpose.

302. Ownership of Materials and Documents

Any and all sketches, drawings, tracings, field survey notes, computations, detail, and other materials and documents prepared by the Consultant shall be the joint property of the Corporation and the Consultant from the moment of their preparation, and the Consultant shall deliver such materials and documents to the Corporation whenever requested to do so by the Corporation. However, the Consultant shall have the right to make duplicate copies of such materials and documents for the Consultant's own file, or other purposes as may be authorized in writing by the Corporation.

303. Non-Disclosure

The designs, plans, reports, investigations, materials, and documents prepared or acquired by the Consultant pursuant to this Agreement (including any duplicate copies kept by the Consultant), shall not be shown or disclosed to any other public or private person or entity, directly or indirectly, except as authorized by the Corporation. The Consultant shall not disclose to any other public or private person or entity any information regarding the activities of the Corporation during the term of this Agreement, except as authorized by the Corporation.

304. Conflict of Interest

(a) Pursuant to the Corporation's duly adopted Conflict of Interest Code, key personnel who will be performing services under this Agreement are required to disclose the following with respect to the Centre City and Horton Plaza Redevelopment Project Areas.

Category 1:

All reportable investments and business positions in, and sources of income and gifts from, any person, firm or entity that that has engaged in or provided any of the following within the boundaries of the Centre City and/or Horton Plaza redevelopment project areas during the applicable reporting period: land development; construction; acquisition or sale of real property; engineering; surveying; architecture; appraisals; soils testing, analysis and/or compaction; office equipment and supplies; newspapers, printing and reproduction services; banks and savings and loan; securities and investment companies; title insurance and escrow; financial audit services; public utilities; insurance, including brokers and agencies; planning, landscaping and/or land use consultants.

Category 2:

All reportable financial interests in real property located within a two (2) mile radius of the boundaries of the Centre City and/or Horton Plaza redevelopment project areas, and any other real property owned or used by the Corporation.

Category 3:

All reportable sources of income and gifts from any person, firm or entity that supplies goods or services to the Corporation.

Category 4:

All reportable investments and business positions in any firm or entity that supplies goods and/or services to the Corporation.

Category 5:

Consultants shall disclose pursuant to the broadest disclosure category in this Conflict of Interest Code, subject to the following limitation: The President may determine that a particular consultant, although occupying a “designated position,” is hired to perform a range of duties that is limited in scope and thus will be required to disclose economic interests in fewer than all 4 of the above categories. Such written determination shall include a description of the consultant’s duties and, based upon that description, a statement of the extent of the consultant’s disclosure requirements. The determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code.

(b) The Corporation has determined that the following consultants are not subject to its Conflict of Interest Code and shall not be required to file economic disclosure forms:

- (1) consultants who volunteer services to the Corporation;
- (2) consultants who provide expertise in limited areas for specific litigation or special projects; and
- (3) expert witnesses.

(c) The City of San Diego Office of the City Clerk will mail a Statement of Economic Interests (Form 700) to the Consultant to be filled out by key personnel for the Consultant. The Consultant shall complete Form 700 and return the original executed document to the Office of the City Clerk within 30 days of the Corporation’s approval of this Agreement. Form 700 is also available online at www.fppc.ca.gov.

(d) City of San Diego Council Policy 000-04 requires that all City consultants (including consultants of the City’s agencies) who file a Statement of Economic Interests complete ethics training upon assuming office and every two years thereafter. Ethics training covers key provisions of the City’s Ethics Ordinance. The Ethics Commission, which is responsible for providing the training, has implemented an online program that will allow consultants to complete the training when it is convenient for their schedule. The training program may be accessed from any computer with internet access. Ethics Commission will

provide details with respect to completion of this requirement. Consultant key personnel shall comply with this requirement.

305. Conflict of Interest/Financial Disclosure

For the duration of this Agreement, the Consultant will not act as a consultant or perform services of any kind for any person or entity which would conflict with the services to be provided herein without the prior written consent of the Corporation.

(a) When consent is granted, the Consultant shall endeavor to avoid involvement on behalf of said new client which would in any manner undermine the effective performance of services by the Consultant for the Corporation.

(b) The Consultant understands and agrees that the services to be provided hereunder are to be rendered at the direction of, under the supervision of, and for the benefit of, the Corporation. In the event that the Consultant is informed that its recommendations and/or other work product under this Agreement will not be implemented in whole or in part, and/or if the Consultant disagrees with or otherwise takes issue with any determination made by the Corporation in connection with, arising from or concerning the subject matter of this Agreement, the Consultant shall address or discuss the same only with representatives of the Corporation. The Consultant understands and agrees that any failure to abide by this provision shall constitute a conflict under this Agreement, and the Corporation may in its sole discretion unilaterally and immediately terminate this Agreement for cause.

(c) The Consultant shall promptly notify the Corporation in the event that (a) conflict(s) occur(s) between the Consultant's new client and the Corporation when circumstances, known to the Consultant, place the Corporation and Consultant's new client in adverse, hostile, or incompatible positions wherein the interests of the Corporation may be jeopardized.

(d) In the event of such a conflict, the Consultant shall meet and confer with the Corporation to determine specific avenues to resolve such conflicts in order to continue to perform services for the Corporation without compromising the Corporation's interests. In the absence of a resolution of such conflicts satisfactory to the Corporation, the Corporation may terminate its Agreement with the Consultant.

(e) The Consultant agrees to alert every client for whom consent is required to the existence of this conflict of interest provision and to include language in its Agreement with said client which would enable the Consultant to comply fully with its terms. This paragraph shall not apply to existing clients of the Consultant for which the Consultant has previously received the Corporation's consent.

(f) This Agreement may be unilaterally and immediately terminated by the Corporation if the Consultant employs an individual who, within the twelve months immediately preceding such employment, in his/her capacity as a Corporation employee, participated in negotiations with or otherwise had an influence on the selection of the Consultant.

306. Insurance

Prior to performing the services herein, and throughout the duration of the Agreement, the Consultant shall, at its sole cost and expense, procure and maintain the following types and limits of insurance, containing the additional insured endorsements and cancellation clause set forth herein. Additionally, each subconsultant shall procure and maintain the types and limits of insurance as may be required by the Corporation, prior to performing any services hereunder.

- (1) **Commercial General Liability** policy with the addition of coverages as broad and as encompassing as the Broad Form Comprehensive General Liability endorsement in the occurrence form, including loading and unloading operations, providing coverage against claims for bodily injury or death and property damage resulting from the Consultant's performance. Defense costs must be paid in addition to limits. There shall be no cross liability exclusion for claims or suits by one insured against another. All rights of subrogation shall be waived. Such insurance shall be primary and non-contributory with any other coverages, including the CORPORATION'S, and such insurance shall afford immediate defense and indemnification of all listed additional insureds including CORPORATION, the REDEVELOPMENT AGENCY OF THE CITY OF SAN DIEGO and the CITY OF SAN DIEGO to the limits of not less than \$1,000,000 per occurrence for all covered losses and not less than \$2,000,000 general aggregate;
- (2) **Worker's Compensation Insurance** as required by the laws of the State of California;
- (3) **Employer's Liability Insurance** with the following limits:
Bodily Injury by Accident: \$1,000,000.00 each accident
Bodily Injury by Disease: \$1,000,000.00 policy limit
Bodily Injury by Disease: \$1,000,000.00 each employee
- (4) **Commercial Automobile Liability** or **Business Auto Policy** with limits not less than \$1,000,000.00 each occurrence, combined single limit for bodily injury or death and property damage. Defense costs must be paid in addition to limits. There shall be no cross liability exclusion for claims or suits by one insured against another. All rights of subrogation shall be waived. Such insurance shall be primary and non-contributory with any other coverages

Both Commercial General Liability and Commercial Automobile Liability insurance policies shall include the following additional insured endorsement language **(unless the insurance policies provide a broad form endorsement, in which case the policy evidencing the broad form endorsement shall be submitted)**:

CENTRE CITY DEVELOPMENT CORPORATION, REDEVELOPMENT AGENCY OF CITY OF SAN DIEGO, AND CITY OF SAN DIEGO AND THE MEMBERS, OFFICERS, DIRECTORS, AGENTS AND EMPLOYEES OF EACH OF THESE THREE ENTITIES ARE LISTED AS ADDITIONAL INSURED ("ADDITIONAL INSURED") AND ARE PROVIDED THE SAME COVERAGE AS THE NAMED

INSURED, INCLUDING THE COST OF DEFENSE, AGAINST CLAIMS FOR BODILY INJURY OR DEATH AND PROPERTY DAMAGE RESULTING FROM THE INSURED'S PERFORMANCE OF THE AGREEMENT FOR CONSULTING SERVICES BETWEEN THE PARTIES DATED _____ UNLESS SUCH CLAIM IS DETERMINED BY A COURT OF COMPETENT JURISDICTION TO HAVE ARISEN FROM THE SOLE NEGLIGENCE OR THE WILLFUL MISCONDUCT OF AN ADDITIONAL INSURED. THE NAMED INSURED'S COVERAGE IS PRIMARY AND SHALL NOT REQUIRE CONTRIBUTION FROM THE ADDITIONAL INSURED'S INSURANCE COVERAGE.

The cancellation clause for the above policies and certificate(s) shall read as follows:

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING COMPANY WILL MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT.

(5) **The Consultant shall also maintain Professional Liability insurance** (errors and omissions insurance) in the amount of \$1,000,000 each claim/aggregate. The covered professional services noted on such policy must specifically include work performed under this Agreement. The policy must pay on behalf of the insured and must include a provision establishing the insurer's duty to defend.

Upon receipt of any certificate of insurance and/or endorsement thereon, the Corporation reserves the right to require the alteration of the above clause. However, the Corporation shall not make any substantive changes to the clause.

The parties agree and the Consultant understands that the specified coverage or limits of insurance in no way limit the Consultant's liability and the Consultant shall maintain with respect to each such policy or agreement evidence of such insurance coverage and endorsements thereon as required by this Section of this Agreement.

307. Liability/Indemnification

(a) The Consultant shall be responsible for all injuries to persons and for all damage to real or personal property of the Corporation or third parties, to the extent caused by or resulting from the Consultant's negligence, or that of its employees, agents, or subconsultants and employees during the performance of or connected with the rendition of services hereunder.

(b) The Consultant shall indemnify and hold harmless the Corporation, the Redevelopment Agency of the City of San Diego ("Agency"), the City of San Diego ("City"), and all officers and employees of each entity from any and all liability, claims, costs (including reasonable attorneys' fees), demands, damages, expenses and causes of action:

- 1) for damages to real or personal property, or personal injury to any third party to the extent resulting from the negligent error, act or omission of the Consultant, its employees, or its agents; or
- 2) to the extent of any breach of the Consultant's obligations, duties or covenants under this Agreement or transactions related to the Consultant's performance hereunder; or
- 3) arising out of and/or relating to any potential or actual conflict of interest and/or the failure to disclose any potential or actual conflict of interest and/or the failure to disclose any matter required to be disclosed herein or in the Disclosure Statement submitted in connection with this request for proposals or by virtue of any regulation, code or statute referred to herein, including without limitation any direct or indirect financial interest in, or contract, agreement, employment, arrangement or understanding with, or business or personal relationship of any kind with, any of the persons or entities who have submitted proposals, or any affiliate, partner, member or shareholder of any such person or entity.

308. Performance of Duties

The Consultant shall be responsible for performance of all services set forth in the attached Scope of Services, and shall perform such services in compliance with all applicable provisions of state and local regulations as well as any guidelines specified and required by the Corporation. The Consultant represents that it and its Subconsultants, if any, shall secure all personnel that may be required to perform the duties specified by this Agreement.

309. Key Personnel

The Consultant acknowledges that the qualifications and expertise of its project managers and key personnel, as identified in Attachment No. 5, Fee Schedule, are a primary consideration in Corporation's selection of the Consultant. Accordingly, the Consultant agrees that it shall not replace or change the identified personnel without first obtaining the Corporation's consent to such replacement or change.

310. Correction of Work

The Consultant shall take responsibility, at its own cost, to correct any incomplete, inaccurate, or defective work, when such inaccuracies are due to the negligence of the Consultant, provided such work has not been accepted in writing by an authorized signatory of the Corporation.

311. Cost Overrun

The Corporation shall not be responsible in any way for monetary losses of any type incurred by the Consultant which result from the Corporation's contractual relationship with the Consultant. The Corporation and the Consultant agree that the Consultant's monetary compensation is limited to the amount provided for in the Agreement, and that the Corporation shall not be responsible for cash costs or support services other than as provided in any part of this Agreement and its attachments.

312. Cost Records

In accordance with generally accepted accounting principles, the Consultant shall maintain full and complete records of the cost of services performed under this Agreement. Such records shall be open to the inspection of the Corporation or to the appropriate federal agencies at all reasonable times.

313. Equal Opportunity

The Consultant acknowledges and understands that the Corporation promotes equal opportunity in employment and contracting and encourages its Consultants to adopt voluntary goals for the participation of small businesses, disabled-owned businesses, woman-owned businesses and firms owned by under-represented ethnic groups in agreements with the Corporation. In furtherance of this policy, the Consultant agrees as follows:

(a) The Consultant shall not discriminate against any employee or applicant for employment on any basis prohibited by law. The Consultant shall provide equal opportunity in all employment practices. The Consultant shall ensure that its subconsultants comply with the City of San Diego's Equal Employment Opportunity Program.

(b) The Consultant shall not discriminate on the basis of race, gender, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring or treatment of subconsultants, vendors, or suppliers. The Consultant shall provide equal opportunity of subconsultants to participate in subcontracting opportunities. The Consultant understands and agrees that violation of this clause shall be considered a material breach of the Agreement and may result in Agreement termination, debarment, or other sanctions.

(c) The Consultant has received, read, understands and agrees to be bound by the Equal Employment Opportunity documents, including City of San Diego Municipal Code, Chapter II, Article 2, Division 27 (Equal Employment Opportunity Program).

(d) The Consultant has submitted, and Corporation acknowledges receipt of, either a Work Force Report or an Equal Employment Opportunity Plan as required by City of San Diego Municipal Code section 22.2705. The Consultant agrees to periodically provide updated reports as requested by the Corporation.

314. Subconsulting

Except for those services set forth in Attachment 5, no services covered by this Agreement shall be subcontracted without the prior written consent of the Corporation.

Upon the Corporation's request, the Consultant agrees to provide to the Corporation, within sixty calendar days, a truthful and complete list of the names of all subconsultants, vendors, and suppliers that the Consultant has used in the past five years on any of its contracts that were undertaken within San Diego County, including the total dollar amount paid by the Consultant for each subcontract or supply contract. The Consultant further agrees to fully cooperate in any investigation conducted by the City pursuant to the City's Nondiscrimination in Contracting Ordinance (Municipal Code Sections 22.3501 - 22.3517). The Consultant understands and agrees that violation of this clause shall be considered a material breach of the contract and may result in remedies being ordered against the Consultant up to and including contract termination, debarment, and other sanctions for violation of the provisions of the Nondiscrimination in Contracting Ordinance. The Consultant further understands and agrees that the procedures, remedies and sanctions provided for in the Nondiscrimination Ordinance apply only to violations of said Nondiscrimination Ordinance.

The Consultant understands and agrees that the schedule of performance set forth in this Agreement and its Attachments requires that it and all of its subconsultants perform their obligations on a timely basis. Therefore, the Consultant agrees that it will, if necessary to adhere to the schedule of performance agreed upon by the parties, terminate its subconsultants in the event of their non-performance, and that it shall include provisions in each subcontract to such effect.

The Consultant shall insert, in each subcontract, appropriate provisions requiring compliance with all terms of this Agreement, except Sections 318, 319, 320, and 321, so that the terms herein will be binding upon all Subconsultants.

315. Assignability

Assignability shall be governed by the following:

(a) The Consultant shall not assign any interest in this Agreement and shall not transfer any interest in the same (whether by assignment or novation) without the prior written approval of the Corporation.

(b) Claims for money due or to become due to the Consultant from the Corporation under this Agreement may be assigned to a bank, trust company, or other financial institutions, or to a Trustee in Bankruptcy, without such approval. Written notice of any such assignment or transfer shall be furnished promptly to the Agreement.

316. Changes in Scope of Services

(a) The Corporation may, from time to time, request changes in the Scope of Services of the Agreement to be performed hereunder. Such changes, including any increase or decrease in the amount of the Consultant's compensation, which are mutually agreed upon by and between the Corporation and the Consultant, shall be incorporated into this Agreement.

(b) The Consultant shall attempt to determine as soon as possible, in the required study of the area involved, those factors which could severely inhibit or prohibit achievement of the full range of the Scope of Services outlined in Agreement Attachment No. 1. If it appears that such factors are present, the Consultant shall so inform the Corporation who, in turn, may discuss the feasibility of continuing with the full Scope of Services. The objective of this Section of the Agreement is to minimize the Corporation's costs if these adverse factors exist.

317. Termination

(a) Either the Consultant or the Corporation may terminate this Agreement without cause by providing the other party with a thirty-day (30-day) written notice of termination. Immediately upon receipt of the notice of termination, the Consultant shall discontinue work and incur no further obligation or expenses. This Agreement shall cease to be effective on the 30th day of said written notice with no further action required by either party. The Consultant shall be paid for all work specified in the Scope of Services that is satisfactorily completed prior to the effective date of said termination.

(b) If, through any cause within its control, the Consultant fails to fulfill in a timely and professional manner, its obligations under this Agreement, or if the Consultant shall violate any of the terms or provisions hereof, the Corporation shall have the right to terminate this Agreement effective immediately upon giving written notice thereof to the Consultant. The Consultant shall be paid for all work specified in the Scope of Services that is satisfactorily completed prior to the effective date of said termination.

318. Attorneys' Fees and Costs

If any legal action or any arbitration or other proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default, or misrepresentation in connection with any of the provisions of this Agreement, the successful or prevailing Party or Parties shall be entitled to recover reasonable attorneys' fees and other costs incurred in that action or proceeding, in addition to any other relief to which it or they may be entitled.

319. Entire Agreement

This Agreement, including all attachments hereto, represents the sole and entire agreement between the Corporation and the Consultant and supersedes all prior negotiations, representations, agreements, arrangements or understandings, either oral or written, between or among the Parties hereto, relating to the subject matter of this Agreement, which

are not fully expressed herein. No waiver, alteration, or modification of any of the provisions of this Agreement shall be binding unless in writing and signed by a duly authorized representative of both the Corporation and the Consultant.

320. Partial Invalidity

If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions of this Agreement shall remain in full force and effect and shall in no way be affected, impaired or invalidated.

321. Agreement Governed by Law of State of California

This Agreement and its performance and all suits and special proceedings under this Agreement shall be construed in accordance with the laws of the State of California. In any action, special proceeding, or other proceeding that may be brought arising out of, under, or because of this Agreement, the laws of the State of California shall be applicable and shall govern to the exclusion of the law of any other forum, without regard to the jurisdiction in which the action or special proceeding may be instituted.

322. Drug-Free Workplace

The Consultant agrees to comply with the City of San Diego's Council Policy 100-17 that requires the Consultant to provide a drug-free workplace for the performance of work done in connection with the Agreement let by the Corporation.

323. Americans with Disabilities Act

The Consultant agrees to comply with City of San Diego's Council Policy 100-04, which establishes that all consultants shall comply with all applicable titles of the Americans with Disabilities Act.

In addition, the Consultant shall warrant and certify that any Project plans and specifications prepared in accordance with this Agreement meet all current California Building Standards Code, California Code of Regulations, Title 24 and the Americans with Disabilities Act of 1990. When a conflict exists between Title 24 and ADAAG, the most restrictive requirement shall be followed.

324. Sexual Harassment Prevention Policy

Contractor agrees to comply with the prohibition against sexual harassment as set forth in Corporation's Sexual Harassment Policy, a current copy of which is attached hereto and incorporated herein by this reference, with respect to the performance of work done in connection with the Agreement.

325. Force Majeure

Except as expressly provided herein, in the event that the Consultant shall be delayed, hindered in or prevented from the performance of the Scope of Services by reasons that are wholly beyond the Consultant's control then the Consultant may submit in writing its request to the Corporation that its performance of the same be extended for a period equivalent to the reasonable length of such delay; upon receipt thereof, the Corporation shall review and make its reasonable determination as to any such request.

AGREEMENT ATTACHMENT NO. 3
CENTRE CITY DEVELOPMENT CORPORATION
SEXUAL HARASSMENT POLICY

Sexual harassment is a violation of Title VII of the Federal Civil Rights Act of 1964 and of the California Fair Employment and Housing Act, and it will not be tolerated by the Corporation. Engaging in sexual harassment is grounds for disciplinary action, up to and including termination; thus, all allegations will be taken seriously and will be promptly investigated. There will be no retribution against anyone reporting harassment or cooperating in an official investigation, regardless of the outcome of the investigation.

This policy covers all employees. The Corporation will not tolerate, condone or allow sexual harassment, whether engaged in by co-workers, supervisors, associates, clients or other non-Employees who conduct business with the Corporation. Due to the Corporation's "no tolerance" policy, each employee is required to report all incidents of sexual harassment, regardless of who the offender may be, or the offender's relationship to the Corporation.

A. Sexual harassment includes the following behavior:

- 1. Unwelcome sexual advances or physical harassment.** This applies to any physical conduct which a reasonable individual might consider unacceptable, and includes patting, pinching, fondling, brushing up against, hugging, kissing, or cornering.
- 2. Requests for sexual favors.** This refers to subtle or overt requests or pressures for sexual favors which include an implied or explicit promise of preferential treatment or negative consequences regarding the victim's employment relationship.
- 3. Verbal harassment.** This includes epithets, derogatory comments, slurs, or statements which are sexually oriented and considered unacceptable by another person in a work place setting. Verbal harassment is perhaps the most pervasive "unintentional" harassment, often taking the form of sexual humor or comments about an individual's body or appearance which go beyond mere courtesy.
- 4. Visual harassment.** This includes sexually suggestive objects, pictures, or letters, leering, or obscene gestures.

B. Sexual harassment does not refer to an occasional compliment of a socially acceptable nature, or to normal, courteous, and mutually respectful interactions between persons. Rather, it refers to behavior which is not welcome, which may be personally offensive or coercive, which weakens morale and, therefore, interferes with the effectiveness of the work environment.

- C.** Sexual harassment can occur in any setting, including the workplace itself, business trips, and business related social events. If the affected employee is a woman, the standards of a reasonable woman are applied in determining if sexual harassment has occurred. If the target is a man, a reasonable man standard applies.
- D.** Because behavior need not be intentional to be defined as sexual harassment, all employees must be sensitive to avoid conduct which might be wrongly interpreted by others. This should not be a problem for those who conduct themselves in a professional manner and treat others in the work place with respect and dignity at all times. Given its harmful effects on the individual as well as the work place, sexual harassment is not a matter to be taken lightly or joked about.
- E.** The Corporation requires that any employee who believes they are being harassed to promptly notify the offender that his or her behavior is unwelcome. However, if this is either ineffective in stopping the behavior or, for whatever reason, the employee is not comfortable with this direct communication, the incident of perceived sexual harassment is to be reported immediately to the Human Resources Manager or a manager/supervisor the employees feels comfortable with. The Corporation requires a prompt reporting of complaints so that a rapid response and appropriate action may be taken. This policy not only aids the complainant, but also helps to maintain an environment free from harassment for all employees and permits immediate investigation of any allegation.
- F.** Any employee with supervising responsibility is required to report to the Human Resources Manager, the Vice President or a Vice President of the Corporation, any complaint of sexual harassment by any employee of the Corporation. Failure to do so will subject the supervising employee to discipline, including possible termination of employment by the Corporation.
- G.** All complaints will be promptly investigated, including interviews of the alleged victim, the alleged harasser, and any witnesses. Confidentiality will be maintained throughout the investigatory process to the extent practical and appropriate under the circumstances. When the investigation is complete, its conclusion will be promptly communicated to the alleged victim and the alleged harasser. If during the investigation it is determined that a person intentionally made a false claim of harassment or intentionally gave false information in connection with a complaint investigation, appropriate action will be taken against that person, including possible termination of employment by the Corporation.
- H.** If the investigation concludes that harassment has occurred, the Corporation will take disciplinary action, against the harasser commensurate with the severity of the offense, and the victim will be advised of the action taken against the harasser. The Corporation's response at a minimum will include reprimanding the offender and preparing a written record which will be placed in the offender's personnel file. Additional action may include: referral to counseling, withholding of a promotion, reassignment, temporary suspension without pay, or termination.

- I. The Corporation will not in any way retaliate against an employee who makes a good faith report of sexual harassment or tolerate any retaliation by any other employee. Retaliation is a serious violation of this sexual harassment policy and must be reported immediately. Any employee found to have retaliated against another employee for reporting sexual harassment will be subject to the same disciplinary action provided for sexual harassment offenders.

AGREEMENT ATTACHMENT NO. 4
FEE SCHEDULE

Consultant shall be paid for services based upon the following fee schedule. The hourly fees listed herein shall be in effect through the duration of the Agreement

Position	Rate
	\$/hr
	\$/hr
	\$/hr
	\$/hr
	\$/hr

AGREEMENT ATTACHMENT NO. 5
SUBCONSULTANT LIST

The Consultant shall use the following subconsultants in the performance of the work required by the Agreement:

- ✓ XYZ Subconsultant Company

Consultant shall not use any other subconsultant(s) or substitute subconsultant(s) listed above without the written consent of the Corporation.



Appendix C – Equal Opportunity Program

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Attachment C.1 – CCDC Equal Opportunity Policy

I. Purpose

This document is to set forth Centre City Development Corporation's (CCDC's) Equal Opportunity Policy and Equal Employment Opportunity Program guidelines for business contracting. Business contracting includes, but is not limited to; hiring of persons and businesses for consultant services, vendors, and contractors by CCDC and developers and property owners that enter into Disposition and Development Agreements (DDA's) and Owner Participation Agreements (OPA's) with the Redevelopment Agency of the City of San Diego.

II. Policy to Ensure and Promote Equal Opportunity in Business Contracting

A. It is the policy that race, religion, sex, color, ethnicity, sexual orientation, national origin, and disabilities will not be used as criteria in its business contracting practices. Every effort will be made to ensure that all persons and businesses will have equal access to contracts and other business opportunities with CCDC.

B. CCDC is strongly committed to equal opportunity in the solicitation of business contracting to assure that persons or businesses doing business with or receiving funds from CCDC are an equal opportunity business and employer. CCDC endeavors to do business with firms that share CCDC's commitment to equal opportunity and will not do business with any firm which discriminates.

C. The Board of Directors for CCDC and its staff expect persons and businesses doing business with CCDC to take positive steps to expand their subconsulting and subcontracting solicitation base and offer opportunities to all eligible persons or businesses.

D. CCDC encourages businesses to contract with small businesses, disabled-owned businesses, women-owned businesses, firms owned by underrepresented ethnic groups (African-Americans, Asian-Americans, Filipinos, Latinos and Native Americans), and local firms or enter into a joint venture with these firms.

III. Guidelines for Equal Employment Opportunity (EEO) Program for Business Contracting

A. EEO is fair treatment in employment, promotion, training, and other personnel actions without regard to race, color, religion, sex, age, sexual orientation, national origin, and physical or mental disability.

B. Business contractors shall take the required steps to ensure equal employment opportunity within their own workplace and set forth action to achieve the County Labor Force Availability

measures for the employment of underrepresented ethnic groups (African-Americans, Asian-Americans, Filipinos, Latinos and Native Americans), women and people with disabilities.

C. CCDC has implemented the City's Equal Employment Opportunity Program. The overall objective of the program is to ensure that business contracting entities doing business with or receiving funds from the City of San Diego and CCDC will not engage in unlawful discriminatory employment practices prohibited by state or federal law.

D. Persons or businesses shall comply with requirements of the City of San Diego Ordinance No. 18173, Section 27.2701 through 22.2708, Equal Employment Opportunity Outreach Program.

Adopted by CCDC's Board of Directors December 5, 2001

Attachment C.2 – EEO Program

SAN DIEGO MUNICIPAL CODE DIVISION 27

EQUAL EMPLOYMENT OPPORTUNITY OUTREACH PROGRAM

§ 22.2701 Purpose and Intent

The overall objective of the City's Equal Employment Opportunity (EEO) Program is to ensure that contractors doing business with or receiving funds from the City will not engage in unlawful discriminatory employment practices prohibited by state or federal law. Such employment practices include, but are not limited to the following: employment, promotion or upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training, including apprenticeship.

§ 22.2702 Definitions

Unless stated otherwise, the following definitions apply to this Division:

"City" means The City of San Diego and those agencies, boards, commissions and corporations authorized to act on behalf of, or as an agent for, the City of San Diego.

"Contract" means an agreement to provide labor, materials, supplies or services in the performance of a contract, franchise, concession or lease granted, let or awarded by or on behalf of the City.

"Contractor" means any person, firm, partnership, corporation, or combination thereof, who is selected to enter into, or actually enters into a contract with department heads and officers empowered by law to enter into contracts on behalf of the City for public works or improvements to be performed, or for a franchise, concession or lease of property, or for goods, services or supplies to be purchased, at the expense of the City or to be paid out of moneys deposited in the treasury or out of trust moneys under the control of, or collected by, the City.

"Equal Employment Opportunity Plan" means a document prepared by a contractor in accordance with a form and format supplied by

the City which describes the contractor's plan of action.

"Gender" means the character of being male or female.

"Program Manager" means the Program Manager for the City's Equal Opportunity Contracting Program or his or her designee.

"Workforce Analysis" means a comparison of a contractor's Workforce Report with applicable County Labor Force Availability data.

"Workforce Report" means a report, in a format supplied by the City but compiled by the contractor, of the contractor's total work force which indicates the number of males and females in each identified ethnic group by occupational category.

§ 22.2703 Scope

Except as provided in Section 22.2704, this Division applies to all contractors except:

(a) Contractors and subcontractors who do less than a total of \$10,000 worth of business with the City during the preceding twelve (12) months or who have less than a total of fifteen (15) employees, except that contractors exempted by this Subsection shall be subject to audits pursuant to Section 22.2707 to determine if unlawful discriminatory employment practices are occurring.

(b) Contracts to which any city (other than the City of San Diego), county, district or other political subdivision, or any joint powers authority created under authority of law, or other public entity, or any other group or combination of the foregoing acting as a unit, is a party.

(c) Nonprofit charitable, educational, or religious associations or corporations, as evidenced by records on file with the City to be compiled for purposes of this Division in accordance with procedures established by the City Manager.

(d) Emergency contracts, if a written partial or full waiver is granted by the City Manager except that contractors exempted by this Subsection shall be subject to audits pursuant to Section 22.2707 to determine if unlawful

discriminatory employment practices are occurring. The City Manager may grant a partial or full waiver from the requirements of this Division for an emergency contract only to the limited extent necessary in order to expedite the award of such contract. For purposes of this Section, the term "emergency" has the same meaning as in San Diego City Charter, Section 94.

§ 22.2704 Mandatory Nondiscrimination Contract Clause

Notwithstanding the provisions of Section 22.2703, every contract shall contain a nondiscrimination clause which shall read as follows:

Contractor shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Contractor shall provide equal opportunity in all employment practices. Prime contractors shall ensure that their subcontractors comply with this Program. Nothing in this Section shall be interpreted to hold a prime contractor liable for any discriminatory practice of its subcontractors.

§ 22.2705 Duty to Submit Reports

(a) If a contract is competitively solicited, after the lowest responsible bidder has been determined and prior to the execution of the contract, the apparent low bidder shall submit to the Equal Opportunity Contracting Program a Workforce Report, on a City form, or an Equal Employment Opportunity Plan approved by the Program Manager.

If a contract is not competitively solicited, the contractor shall submit to the Equal Opportunity Contracting Program a Workforce Report or an Equal Employment Opportunity Plan approved by the Program Manager prior to tendering the signed contract documents to the City for signature.

(b) Staff will conduct a workforce analysis on all Workforce Report submittals to determine whether or not an Equal Employment Opportunity Plan is required. If an Equal Employment Opportunity Plan is required, the contractor will submit a Plan for approval by the Program Manager.

(c) Any Equal Employment Opportunity Plan approved by the City shall not include

quotas, goals or timetables for increasing women and minority employment and will not require terminating or laying off existing employees.

(d) If the apparent low bidder or contractor does not submit either a Workforce Report or Equal Employment Opportunity Plan as required by this Section, for purposes of awarding the contract only, the City Manager will ensure an administrative hearing is conducted by an independent hearing officer to determine if the contract should be awarded in accordance with city, state, and federal law.

§ 22.2706 Duty to Comply with Equal Employment Opportunity Plan

A contractor for whom an Equal Employment Opportunity Plan has been approved by the City shall use best efforts to comply with that Equal Employment Opportunity Plan.

§ 22.2707 Reviews

(a) The Program Manager shall conduct periodic reviews of contractors to ensure that unlawful discrimination is not being practiced and Equal Employment Opportunity Plans are implemented.

(b) If the City Manager determines, after review, that the contractor has not implemented their Equal Employment Opportunity Plan and/or practices unlawful discrimination and corrective action has not occurred by the contractor after sufficient notice, the City Manager may recommend termination of the contract and debarment to the City Council.



Attachment C.3 – Equal Opportunity Agreement

NONDISCRIMINATION CLAUSE: Contractor shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Contractor shall provide equal opportunity in all employment practices. Contractor shall ensure that its subcontractors comply with CCDC's Equal Employment Opportunity Program.

EQUAL EMPLOYMENT OPPORTUNITY (EEO): Contractor has received, read, understands and agrees to be bound by the City of San Diego Municipal Code, Chapter II, Article 2, Division 27 (Equal Employment Opportunity Program) provided as Attachment C.2 of this package.

Contractor has submitted either a Workforce Report or an Equal Employment Opportunity Plan as required by Section 22.2705 of the City of San Diego Municipal Code.

City and contractor agree that compliance with EEO provisions will be implemented, monitored, and reviewed by CCDC's Equal Opportunity Contracting Program staff.

EQUAL OPPORTUNITY CONTRACTING: Contractor has received, read, understands and agrees to be bound by the Equal Opportunity Contracting Program requirements described in the proposal package.

If requested, contractor shall submit the Outreach and Teaming Survey. Contractor agrees to provide updated reports as requested by CCDC.

Contractor agrees to insert equal opportunity compliance language into all subcontracts for any work covered by this Agreement and such provisions will be binding upon each subcontractor.

Company Name: _____ *Date:* _____

Authorized Signature: _____

Print Authorized Signature Name: _____



Attachment C.4 – EO Advisory Goals and Guidelines

Any project valued at \$25,000 or more has a voluntary subcontracting goal of 20 percent. The goal is achieved by contracting with any combination of certified Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Disadvantaged Business Enterprise (DBE), Disabled Veteran Business Enterprise (DVBE), Small Business Enterprise (SBE) and/or Other Business Enterprise (OBE) firms at the prime, coventure partner, subconsultant and/or vendor level. Attainment of the goal is strongly encouraged but strictly voluntary.

- ✓ To qualify for DBE certification, the business firm must provide proof of being socially and economically disadvantaged as identified in Caltrans' DBE certification process.
- ✓ To qualify for DVBE certification, a firm must provide proof that it is owned and operated by one or more veterans with a Service-related disability and the management of the firm is controlled by the qualifying party(ies).
- ✓ To qualify for MBE certifications, the business firm must provide proof of being at least 51 percent owned and operated by African-Americans, Asians, American Indians, Filipinos, and/or Latinos and that its management is controlled by one or more members of the identified ethnic groups.
- ✓ To qualify for SBE certification, the business must be independently owned and operated, cannot be dominant in its field of operation, must have a principal office in California and owners living in California and, together with its affiliates, be either: Businesses with 99 or fewer employees and average gross receipts of \$10 million or less over the previous three tax years, or be a manufacturer with 100 or fewer employees.
- ✓ To qualify for WBE certification, the business firm must provide proof of being at least 51 percent owned and operated by one or more women and its management be controlled by one or more women.
- ✓ OBE means any business which does not otherwise qualify as a Minority, Women, Disadvantaged, or Disabled Veteran Business Enterprise.



Attachment C.5 – Strategies for Successful Team

1. Search in the Public Agency Certified Firm Directory at www.ccdc.com.
2. Use City and Caltrans directories of DBE, DVBE, MBE, WBE, and SBE-certified businesses providing the needed services. Call or write to the listed certified firms. Directories are available at the City's EOCP office, 619-533-4464; and Caltrans, 916-445-3520 or on the Internet at www.dot.ca.gov/hq/bep/.
3. Search the federal directory of certified firms under www.ccr.gov.
4. Attend scheduled presubmittal meetings to network with subconsultants.
5. Advertise subconsulting opportunities in general circulation, trade associations, community organizations and special interest newspapers in a timely manner, including but not limited to entities reaching out to DBEs, DVBEs, MBEs, WBEs, SBEs, and certified firms.
6. For referrals, use the services of community organizations, professional associations focusing on, but not limited to, women and underrepresented ethnic groups, and local, state, and federal small business assistance offices and other organizations.

Attachment C.6 – Workforce Report

The objective of the Equal Employment Opportunity Outreach Program, San Diego Municipal Code sections 22.3501 through 22.3517, is to ensure that contractors doing business with the City, or receiving funds from the City, do not engage in unlawful discriminatory employment practices prohibited by state and federal law. Such employment practices include, but are not limited to unlawful discrimination in the following: employment, promotion or upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training, including apprenticeship. Contractors are required to provide a completed Workforce Report (WFR).

CONTRACTOR IDENTIFICATION

Type of Contractor: ☐ Construction ☐ Vendor/Supplier ☐ Financial Institution ☐ Lessee/Lessor
☐ Consultant ☐ Grant Recipient ☐ Insurance Company ☐ Other

Name of Company: _____

AKA/DBA: _____

Address (Corporate Headquarters, where applicable): _____

City _____ County _____ State _____ Zip _____

Telephone Number: () _____ Fax Number: () _____

Name of Company CEO: _____

Address(es), phone and fax number(s) of company facilities located in San Diego County (if different from above):

Address: _____

City _____ County _____ State _____ Zip _____

Telephone Number: () _____ Fax Number: () _____

Type of Business: _____ Type of License: _____

The Company has appointed: _____

as its Equal Employment Opportunity Officer (EEOO). The EEOO has been given authority to establish, disseminate, and enforce equal employment and affirmative action policies of this company. The EEOO may be contacted at:

Address: _____

Telephone Number: () _____ Fax Number: () _____

Check the box that applies to this WFR: ☐ One San Diego County (or Most Local County) Workforce – Mandatory
☐ Branch Workforce *
☐ Managing Office Workforce

**Submit a separate Workforce Report for all participating branches. Combine WFRs if more than one branch per county.*

I, the undersigned representative of _____
 _____ (Firm Name)

_____ hereby certify that information provided
 _____ (County) _____ (State)

herein is true and correct. This document was executed on this _____ day of _____, 200 ____

_____ (Authorized Signature) _____ (Print Authorized Signature)

WORKFORCE REPORT – NAME OF FIRM: _____ **DATE:** _____

OFFICE(S) or BRANCH(ES): _____ **COUNTY:** _____

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total workforce. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- | | |
|--|--|
| (1) Black, African-American | (5) Filipino |
| (2) Hispanic, Latino, Mexican-American, Puerto Rican | (6) White, Caucasian |
| (3) Asian, Pacific Islander | (7) Other ethnicity; not falling into other groups |
| (4) American Indian, Eskimo | |

OCCUPATIONAL CATEGORY	(1) Black		(2) Hispanic		(3) Asian		(4) American Indian		(5) Filipino		(6) White		(7) Other Ethnicities	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Management & Financial														
Professional														
A&E, Science, Computer														
Technical														
Sales														
Administrative Support														
Services														
Crafts														
Operative Workers														
Transportation														
Laborers*														

*Construction laborers and other field employees are not to be included on this page

Totals Each Column														
--------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Grand Total All Employees	
---------------------------	--

Indicate by Gender and Ethnicity the Number of Above Employees Who Are Disabled

Disabled														
----------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Nonprofit Organizations Only:

Board or Directors														
--------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

History

The Workforce Report (WFR) is the document that allows the City of San Diego to analyze the work forces of all firms wishing to do business with the City. We are able to compare the firm's workforce data to County Labor Force Availability (CLFA) data derived from the United States Census. CLFA data is a compilation of lists of occupations and includes the percentage of each ethnicity we track (Black, Hispanic, Asian, American Indian, Filipino) for each occupation. Currently, our CLFA data is taken from the 2000 Census. To compare one firm to another, it is important that the data we receive from the consultant firm is accurate and organized in the manner that allows for this fair comparison.

Workforce & Branch Workforce Reports

When submitting a WFR, especially if the WFR is for a specific project or activity, we would like to have information about the firm's workforce that is actually participating in the project or activity. That is, if the project is in San Diego and the workforce is from San Diego, we want a San Diego County Workforce Report.¹ By the same token, if the project is in San Diego, but the workforce is from another county, such as Orange or Riverside County, we want a Workforce Report from that county.² If participation in a San Diego project is by workforces from San Diego County and, for example, from Los Angeles County and from Sacramento County, we ask for separate Workforce Reports representing the workforces of your firm from each of the three counties.^{1,2} On the

other hand, if the project will be accomplished completely outside of San Diego, we ask for a Workforce Report from the county or counties where the work will be accomplished.²

Managing Office Workforce

Equal Opportunity Contracting may occasionally ask for a Managing Office Workforce (MOWF) Report. This may occur in an instance where the firm involved is a large national or international firm but the San Diego or other local workforce is very small. In this case, we may ask for both a local and a MOWF Report.^{1,3} In another case, when work is done only by the Managing Office, only the MOWF Report may be necessary.³

Types of Workforce Reports

Please note, throughout the preceding text of this page, the superscript numbers. These coincide with the types of workforce reports required in the example. See below:

- ¹ One San Diego County (or Most Local County) Workforce – Mandatory in most cases
- ² Branch Workforce *
- ³ Managing Office Workforce

**Submit a separate Workforce Report for all participating branches. Combine WFRs if more than one branch per county.*

Exhibit: Workforce Report Job Categories

Refer to this table when completing your firm's Workforce Report form(s).

Management & Financial

Advertising, Marketing, Promotions, Public Relations, and Sales Managers
Business Operations Specialists
Financial Specialists
Operations Specialties Managers
Other Management Occupations
Top Executives

Professional

Art and Design Workers
Counselors, Social Workers, and Other Community and Social Service Specialists
Entertainers and Performers, Sports and Related Workers
Health Diagnosing and Treating Practitioners
Lawyers, Judges, and Related Workers
Librarians, Curators, and Archivists
Life Scientists
Media and Communication Workers
Other Teachers and Instructors
Postsecondary Teachers
Primary, Secondary, and Special Education School Teachers
Religious Workers
Social Scientists and Related Workers

Architecture & Engineering, Science, Computer

Architects, Surveyors, and Cartographers
Computer Specialists
Engineers
Mathematical Science Occupations
Physical Scientists

Technical

Drafters, Engineering, and Mapping Technicians
Health Technologists and Technicians
Life, Physical, and Social Science Technicians
Media and Communication Equipment Workers

Sales

Other Sales and Related Workers
Retail Sales Workers
Sales Representatives, Services
Sales Representatives, Wholesale and Manufacturing
Supervisors, Sales Workers

Administrative Support

Financial Clerks
Information and Record Clerks
Legal Support Workers
Material Recording, Scheduling, Dispatching, and Distributing Workers
Other Education, Training, and Library Occupations
Other Office and Administrative Support Workers
Secretaries and Administrative Assistants
Supervisors, Office and Administrative Support Workers

Services

Building Cleaning and Pest Control Workers
Cooks and Food Preparation Workers
Firefighting and Prevention Workers

First-Line Supervisors/Managers, Protective Service Workers
Food and Beverage Serving Workers
Funeral Service Workers
Law Enforcement Workers
Nursing, Psychiatric, and Home Health Aides
Occupational and Physical Therapist Assistants and Aides
Other Food Preparation and Serving Related Workers
Other Health Care Support Occupations
Other Personal Care and Service Workers
Other Protective Service Workers
Personal Appearance Workers
Supervisors, Food Preparation and Serving Workers
Supervisors, Personal Care and Service Workers
Transportation, Tourism, and Lodging Attendants

Crafts

Construction Trades Workers
Electrical and Electronic Equipment Mechanics, Installers, and Repairers
Extraction Workers
Material Moving Workers
Other Construction and Related Workers
Other Installation, Maintenance, and Repair Occupations
Plant and System Operators
Supervisors of Installation, Maintenance, and Repair Workers
Supervisors, Construction and Extraction Workers
Vehicle and Mobile Equipment Mechanics, Installers, and Repairers
Woodworkers

Operative Workers

Assemblers and Fabricators
Communications Equipment Operators
Food Processing Workers
Metal Workers and Plastic Workers
Motor Vehicle Operators
Other Production Occupations
Printing Workers
Supervisors, Production Workers
Textile, Apparel, and Furnishings Workers

Transportation

Air Transportation Workers
Other Transportation Workers
Rail Transportation Workers
Supervisors, Transportation and Material Moving Workers
Water Transportation Workers

Laborers

Agricultural Workers
Animal Care and Service Workers
Fishing and Hunting Workers
Forest, Conservation, and Logging Workers
Grounds Maintenance Workers



C.7 – Subconsultant and Vendor List

Submittals shall include a complete list of ***all*** proposed coventure partners, subconsultants and vendors receiving in excess of one half of one percent (.05%) of the total contract or \$10,000, whichever is less. Listed subconsultants and vendors must provide services in the profession, trade, or craft listed. All columns shall be filled out. **No changes to this subconsultant list will be allowed without prior written approval from CCDC. This document becomes part of the contract.**

Respondent shall also submit subconsultant commitment letters on subconsultant letterhead, no more than one page each from subconsultants listed below, to acknowledge their commitment to the team, scope of services, and percent of participation in the project (Attachment C.8 provides an outline for the commitment letters).

NAME AND ADDRESS OF SUBCONSULTANTS	SCOPE OF WORK	DBE, DVBE, MBE, SBE or WBE	WHERE CERTIFIED

For information only. As appropriate, respondent shall identify coventures, subconsultants or vendors according to the list on the following page.

Certified Disadvantaged Business Enterprise	DBE
Certified Disabled Veteran Business Enterprise	DVBE
Certified Minority Business Enterprise	MBE
Certified Small Business Enterprise	SBE
Certified Woman Business Enterprise	WBE
Other Business Enterprise (not certified)	OBE

Attachment C.8 – Letter of Intent

Date

Name
Company
Address

SUBJECT: LETTER OF INTENT TO SUBCONTRACT OR COVENTURE
(assignment name and number, if any)

Dear:

Please consider this as written confirmation of our intent to subcontract **or coventure** (*pick one*) with [subconsulting firm or coventure partner firm name] for [trade] services at an approximated percentage of the total contract to be no less than _____%*, should such services be utilized.

The above is contingent upon receiving the contract award from Centre City Development Corporation for [name of contract/project] to [prime consultant name]. Please sign both copies if all meets with your approval and return one to our office.

If you have any questions, do not hesitate to call.

Sincerely,

SUBCONTRACT AGREEMENT

I, _____, agree to the aforementioned.
(Print Name)

(Signature) (Title) Date _____

**If dollar amount is not known for the coventure partner, please give the approximate percentage of the contract based on functional consultant partnership percentage.*

Attachment C.9 – CCDC Outreach Survey

Centre City Development Corporation is evaluating the effectiveness of its outreach efforts for consultant contracting opportunities. We appreciate your cooperation in completing this sheet and returning it with your proposal. Thank you.

How did you find out about this consultant services opportunity?

- | | |
|---|--|
| ☐ San Diego Daily Transcript | ☐ San Diego Voice & Viewpoint |
| ☐ San Diego Asian Journal | ☐ El Sol de San Diego |
| ☐ El Latino | ☐ San Diego Monitor News |
| ☐ The Filipino Press | ☐ Mabuhay Times |
| ☐ Enlace | ☐ Contractor News & Views |
| ☐ Los Angeles Times | |
| ☐ Other publication: _____ | |

OR

- ☐ Community and Professional Organizations *(please list the organization)*

African-American: _____

American-Indian: _____

Asian-American: _____

Filipino: _____

Hispanic: _____

Other: _____

OR

- ☐ CCDC Employee
- ☐ CCDC's Web site
- ☐ E-mail from CCDC
- ☐ Other _____



Appendix D – Additional Project Documents

Table of Contents

Attachment D.1 – Selection Criteria Form

Attachment D.2 – Disclosure Statement



Attachment D.1 – Selection Criteria

CCDC-Adopted Adjectives

The following adjectives shall be utilized in the selection process. Respondents shall be ranked using one of these adjectives for each of the criteria listed on the next page.

Exceptional (E)

Exceeds requirements; has a high probability of an exceptional outcome; exhibits no significant weaknesses; exhibits no blatant deficiencies.

Good (G)

Meets all and exceeds some requirements; has a high probability of an above average outcome; exhibits minor, correctable weaknesses; exhibits no blatant deficiencies.

Fair (F)

Meets all requirements; will probably result in an average outcome; exhibits minor, correctable weaknesses; exhibits minor, correctable deficiencies.

Marginal (M)

Meets most requirements; will probably result in a below average outcome; exhibits correctable weaknesses requiring clarification; exhibits correctable deficiencies requiring correction.

Poor (P)

Fails to meet requirements; will probably result in an unacceptable outcome; exhibits too many weaknesses; exhibits too many deficiencies.

CCDC Selection Criteria

Listed below are the criteria that must be used to evaluate all submittals:

Criterion No. 1 – Submittal Documents

Is the submittal complete and well composed? Does the submittal mirror the organizational requirements described in the solicitation, including conformance with tabulation and categorical organization, clarity of writing, and cohesiveness of narrative, tables and images?

Criterion No. 2 – Understanding and Methodology

Does the submittal demonstrate that the respondent understands the Scope of Services, proposes an exceptional methodology that will lead to success, and is able to demonstrate how said methodology has been successful in respondent's past experience?

Criterion No. 3 – Samples of Work and/or Project References

Does the submittal include samples of work that specifically illustrate an understanding of the proposed work as well as a demonstrably successful product? Do project references confirm assertions made in the response and subsequently made verbally during the interview?

Criterion No. 4 – Project Personnel Experience and References

Do proposed project personnel meet all specified criteria set out in the solicitation? Is the level of experience commensurate with the complexity of the Scope of Services? Do personnel references confirm assertions made in the response and subsequently made verbally during the interview?

Criterion No. 5 – Equal Opportunity

Does the submittal include evidence of a willingness to make meaningful and wide-range subconsulting and employment opportunities available to all interested and qualified firms and individuals in the marketplace?

Attachment D.2 – Disclosure Statement

Consultant's statement of disclosure of certain ownership interests on all contracts which will require discretionary action on the part of CCDC, the Redevelopment Agency, City Council, and Planning Commission of the City of San Diego.

The following information must be disclosed:

1. List the names of all persons having a financial interest in the consultant's business.

2. If any person identified pursuant to (1) above is a corporation or partnership, list the names of all individuals owning more than 10% of the shares in the corporation or owning any partnership interest in the partnership.

3. If any person identified pursuant to (1) above is a nonprofit organization or a trust, list the names of any person serving as director of the nonprofit organization or as trustee or beneficiary or trustor of the trust.

4. Have you had more than \$250 worth of business transacted with any member of the Corporation Board, Planning Commission, or Council/Agency members within the past twelve months?

Yes _____ No _____ If yes, please indicate person(s)

--	--

5. List the address of any property owned by the consultant's firm or principals identified in (2) that is located within the Centre City and Horton Plaza Redevelopment Projects.

Person is defined as: "Any individual, firm, copartnership, joint venture, association, social club, fraternal organization, corporation, estate, trust, receiver, syndicate, this and any other group or combination acting as a unit."

(NOTE: Attach additional pages as necessary.)

Authorized Signature of Firm Date

Print or type name of firm