

**CITY OF SANTA ROSA  
PROFESSIONAL SERVICES AGREEMENT  
WITH CARLILE MACY, INC.  
AGREEMENT NUMBER \_\_\_\_\_**

This "Agreement" is made as of this \_\_\_\_ day of \_\_\_\_\_, 2022, by and between the City of Santa Rosa, a municipal corporation ("City"), and Carlile Macy, Inc., a California Corporation ("Consultant").

**R E C I T A L S**

- A. City desires to obtain landscape architectural design, engineering, and construction document services for South Davis Neighborhood Park.
- B. City desires to retain a qualified firm to conduct the services described above in accordance with the Scope of Services as more particularly set forth in Exhibit A to the Agreement.
- C. Consultant represents to City that it is a firm composed of highly trained professionals and is fully qualified to conduct the services described above and render advice to City in connection with said services.
- D. The parties have negotiated upon the terms pursuant to which Consultant will provide such services and have reduced such terms to writing.

**AGREEMENT**

**NOW, THEREFORE**, City and Consultant agree as follows:

**1. SCOPE OF SERVICES**

Consultant shall provide to City the services described in Exhibit A ("Scope of Services"). Consultant shall provide these services at the time, place, and in the manner specified in Exhibit A. Exhibit A is attached hereto for the purpose of defining the manner and scope of services to be provided by Consultant and is not intended to, and shall not be construed so as to, modify or expand the terms, conditions or provisions contained in this Agreement. In the event of any conflict between this Agreement and any terms or conditions of any document prepared or provided by Consultant and made a part of this Agreement, including without limitation any document relating to the scope of services or payment therefor, the terms of this Agreement shall control and prevail.

**2. COMPENSATION**

a. City shall pay Consultant for services rendered pursuant to this Agreement at the rates, times and in the manner set forth in Exhibit B. Consultant shall submit monthly statements to City which shall itemize the services performed as of the date of the statement and set forth a progress report,

including work accomplished during the period, percent of each task completed, and planned effort for the next period. Invoices shall identify personnel who have worked on the services provided, the number of hours each worked during the period covered by the invoice, the hourly rate for each person, and the percent of the total project completed, consistent with the rates and amounts shown in Exhibit B.

b. The payments prescribed herein shall constitute all compensation to Consultant for all costs of services, including, but not limited to, direct costs of labor of employees engaged by Consultant, travel expenses, telephone charges, copying and reproduction, computer time, and any and all other costs, expenses and charges of Consultant, its agents and employees. In no event shall City be obligated to pay late fees or interest, whether or not such requirements are contained in Consultant's invoice.

c. Notwithstanding any other provision in this Agreement to the contrary, the total maximum compensation to be paid for the satisfactory accomplishment and completion of all services to be performed hereunder shall in no event exceed the sum of two hundred four-thousand, eight-hundred and twenty-two dollars and no cents (\$204,822) The City's Chief Financial Officer is authorized to pay all proper claims from Charge Number 09556.

### **3. DOCUMENTATION; RETENTION OF MATERIALS**

a. Consultant shall maintain adequate documentation to substantiate all charges as required under Section 2 of this Agreement.

b. Consultant shall keep and maintain full and complete documentation and accounting records concerning all extra or special services performed by it that are compensable by other than an hourly or flat rate and shall make such documents and records available to authorized representatives of City for inspection at any reasonable time.

c. Consultant shall maintain the records and any other records related to the performance of this Agreement and shall allow City access to such records during the performance of this Agreement and for a period of four (4) years after completion of all services hereunder.

### **4. INDEMNITY**

a. Consultant shall, to the fullest extent permitted by law, indemnify, protect, defend and hold harmless City, and its employees, officials and agents ("Indemnified Parties") from all claims, demands, costs or liability (including liability for claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, interest, defense costs, and expert witness fees), that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of Consultant, its officers, employees, or agents, in said performance of professional services under this Agreement, excepting only liability arising from the sole negligence, active negligence or intentional misconduct of City.

b. The existence or acceptance by City of any of the insurance policies or coverages described in this Agreement shall not affect or limit any of City's rights under this Section 4, nor shall the limits of such insurance limit the liability of Consultant hereunder. This Section 4 shall not apply to any

intellectual property claims, actions, lawsuits or other proceedings subject to the provisions of Section 17(b), below. The provisions of this Section 4 shall survive any expiration or termination of this Agreement.

## **5. INSURANCE**

a. Consultant shall maintain in full force and effect all of the insurance coverage described in, and in accordance with, Attachment One, "Insurance Requirements." Maintenance of the insurance coverage set forth in Attachment One is a material element of this Agreement and a material part of the consideration provided by Consultant in exchange for City's agreement to make the payments prescribed hereunder. Failure by Consultant to (i) maintain or renew coverage, (ii) provide City notice of any changes, modifications, or reductions in coverage, or (iii) provide evidence of renewal, may be treated by City as a material breach of this Agreement by Consultant, whereupon City shall be entitled to all rights and remedies at law or in equity, including but not limited to immediate termination of this Agreement. Notwithstanding the foregoing, any failure by Consultant to maintain required insurance coverage shall not excuse or alleviate Consultant from any of its other duties or obligations under this Agreement. In the event Consultant, with approval of City pursuant to Section 6 below, retains or utilizes any subcontractors or subconsultants in the provision of any services to City under this Agreement, Consultant shall assure that any such subcontractor has first obtained, and shall maintain, all of the insurance coverages set forth in the Insurance Requirements in Attachment One.

b. Consultant agrees that any available insurance proceeds broader than or in excess of the coverages set forth in the Insurance Requirements in Attachment One shall be available to the additional insureds identified therein.

c. Consultant agrees that the insurance coverages and limits provided under this Agreement are the greater of: (i) the coverages and limits specified in Attachment One, or (ii) the broader coverages and maximum limits of coverage of any insurance policy or proceeds available to the name insureds.

## **6. ASSIGNMENT**

Consultant shall not assign any rights or duties under this Agreement to a third party without the express prior written consent of City, in City's sole and absolute discretion. Consultant agrees that the City shall have the right to approve any and all subcontractors and subconsultants to be used by Consultant in the performance of this Agreement before Consultant contracts with or otherwise engages any such subcontractors or subconsultants.

## **7. NOTICES**

Except as otherwise provided in this Agreement, any notice, submittal or communication required or permitted to be served on a party, shall be in writing and may be served by personal delivery to the person or the office of the person identified below. Service may also be made by mail, by placing first-class postage, and addressed as indicated below, and depositing in the United States mail to:

City Representative:

Jen Santos, Deputy Director Parks  
55 Stony Point Avenue  
Santa Rosa, CA 95401  
707-543-3781  
jsantos@srcity.org

Consultant Representative:

Briana Morrison, Associate Principal  
15 Third Street  
Santa Rosa, CA 95401  
707-535-1541  
bmorrison@carlilemacy.com

## **8. INDEPENDENT CONTRACTOR**

a. It is understood and agreed that Consultant (including Consultant's employees) is an independent contractor and that no relationship of employer-employee exists between the parties hereto for any purpose whatsoever. Neither Consultant nor Consultant's assigned personnel shall be entitled to any benefits payable to employees of City. City is not required to make any deductions or withholdings from the compensation payable to Consultant under the provisions of this Agreement, and Consultant shall be issued a Form 1099 for its services hereunder. As an independent contractor, Consultant hereby agrees to indemnify and hold City harmless from any and all claims that may be made against City based upon any contention by any of Consultant's employees or by any third party, including but not limited to any state or federal agency, that an employer-employee relationship or a substitute therefor exists for any purpose whatsoever by reason of this Agreement or by reason of the nature and/or performance of any services under this Agreement.

b. It is further understood and agreed by the parties hereto that Consultant, in the performance of Consultant's obligations hereunder, is subject to the control and direction of City as to the designation of tasks to be performed and the results to be accomplished under this Agreement, but not as to the means, methods, or sequence used by Consultant for accomplishing such results. To the extent that Consultant obtains permission to, and does, use City facilities, space, equipment or support services in the performance of this Agreement, this use shall be at the Consultant's sole discretion based on the Consultant's determination that such use will promote Consultant's efficiency and effectiveness. Except as may be specifically provided elsewhere in this Agreement, the City does not require that Consultant use City facilities, equipment or support services or work in City locations in the performance of this Agreement.

c. If, in the performance of this Agreement, any third persons are employed by Consultant, such persons shall be entirely and exclusively under the direction, supervision, and control of Consultant. Except as may be specifically provided elsewhere in this Agreement, all terms of employment, including hours, wages, working conditions, discipline, hiring, and discharging, or any other terms of employment or requirements of law, shall be determined by Consultant. It is further understood and agreed that Consultant shall issue W-2 or 1099 Forms for income and employment tax purposes, for all of Consultant's assigned personnel and subcontractors.

d. The provisions of this Section 8 shall survive any expiration or termination of this Agreement. Nothing in this Agreement shall be construed to create an exclusive relationship between

City and Consultant. Consultant may represent, perform services for, or be employed by such additional persons or companies as Consultant sees fit.

**9. ADDITIONAL SERVICES**

Changes to the Scope of Services shall be by written amendment to this Agreement and shall be paid on an hourly basis at the rates set forth in Exhibit B, or paid as otherwise agreed upon by the parties in writing prior to the provision of any such additional services.

**10. SUCCESSORS AND ASSIGNS**

City and Consultant each binds itself, its partners, successors, legal representatives and assigns to the other party to this Agreement and to the partners, successors, legal representatives and assigns of such other party in respect of all promises and agreements contained herein.

**11. TERM, SUSPENSION, TERMINATION**

a. This Agreement shall become effective on the date that it is made, set forth on the first page of the Agreement, and shall continue in effect until both parties have fully performed their respective obligations under this Agreement, unless sooner terminated as provided herein.

b. City shall have the right at any time to temporarily suspend Consultant's performance hereunder, in whole or in part, by giving a written notice of suspension to Consultant. If City gives such notice of suspension, Consultant shall immediately suspend its activities under this Agreement, as specified in such notice.

c. City shall have the right to terminate this Agreement for convenience at any time by giving a written notice of termination to Consultant. Upon such termination, Consultant shall submit to City an itemized statement of services performed as of the date of termination in accordance with Section 2 of this Agreement. These services may include both completed work and work in progress at the time of termination. City shall pay Consultant for any services for which compensation is owed; provided, however, City shall not in any manner be liable for lost profits that might have been made by Consultant had the Agreement not been terminated or had Consultant completed the services required by this Agreement. Consultant shall promptly deliver to City all documents related to the performance of this Agreement in its possession or control. All such documents shall be the property of City without additional compensation to Consultant.

**12. TIME OF PERFORMANCE**

The services described herein shall be provided during the period, or in accordance with the schedule, set forth in Exhibit A. Consultant shall complete all the required services and tasks and complete and tender all deliverables to the reasonable satisfaction of City, not later than June 30, 2022.

**13. STANDARD OF PERFORMANCE**

Consultant shall perform all services performed under this Agreement in the manner and according to the standards currently observed by a competent practitioner of Consultant's profession in California. All products of whatsoever nature that Consultant delivers to City shall be prepared in a professional manner and conform to the standards of quality normally observed by a person currently practicing in Consultant's profession, and shall be provided in accordance with any schedule of performance. Consultant shall assign only competent personnel to perform services under this Agreement. Consultant shall notify City in writing of any changes in Consultant's staff assigned to perform the services under this Agreement prior to any such performance. In the event that City, at any time, desires the removal of any person assigned by Consultant to perform services under this Agreement, because City, in its sole discretion, determines that such person is not performing in accordance with the standards required herein, Consultant shall remove such person immediately upon receiving notice from City of the desire of City for the removal of such person.

#### 14. CONFLICTS OF INTEREST

Consultant covenants that neither it, nor any officer or principal of its firm, has or shall acquire any interest, directly or indirectly, that would conflict in any manner with the interests of City or that would in any way hinder Consultant's performance of services under this Agreement. Consultant further covenants that in the performance of this Agreement, no person having any such interest shall be employed by it as an officer, employee, agent or subcontractor, without the written consent of City. Consultant agrees to avoid conflicts of interest or the appearance of any conflicts of interest with the interests of City at all times during the performance of this Agreement.

#### 15. CONFLICT OF INTEREST REQUIREMENTS

a. **Generally.** The City's Conflict of Interest Code requires that individuals who qualify as "consultants" under the Political Reform Act, California Government Code sections 87200 *et seq.*, comply with the conflict of interest provisions of the Political Reform Act and the City's Conflict of Interest Code, which generally prohibit individuals from making or participating in the making of decisions that will have a material financial effect on their economic interests. The term "consultant" generally includes individuals who make governmental decisions or who serve in a staff capacity.

b. **Conflict of Interest Statements.** The individual(s) who will provide services or perform work pursuant to this Agreement are "consultants" within the meaning of the Political Reform Act and the City's Conflict of Interest Code:

\_\_\_ yes X no (*check one*)

If "yes" is checked by the City, Consultant shall cause the following to occur within 30 days after execution of this Agreement:

- (1) Identify the individuals who will provide services or perform work under this Agreement as "consultants"; and
- (2) Cause these individuals to file with the City Clerk the assuming office statements of economic interests required by the City's Conflict of Interest Code.

Thereafter, throughout the term of the Agreement, Consultant shall cause these individuals to file with the City Clerk annual statements of economic interests, and "leaving office" statements of economic interests, as required by the City's Conflict of Interest Code.

The above statements of economic interests are public records subject to public disclosure under the California Public Records Act. The City may withhold all or a portion of any payment due under this Agreement until all required statements are filed.

## **16. CONFIDENTIALITY OF CITY INFORMATION**

During performance of this Agreement, Consultant may gain access to and use City information regarding inventions, machinery, products, prices, apparatus, costs, discounts, future plans, business affairs, governmental affairs, processes, trade secrets, technical matters, systems, facilities, customer lists, product design, copyright, data, and other vital information (hereafter collectively referred to as "City Information") that are valuable, special and unique assets of the City. Consultant agrees to protect all City Information and treat it as strictly confidential, and further agrees that Consultant shall not at any time, either directly or indirectly, divulge, disclose or communicate in any manner any City Information to any third party without the prior written consent of City. In addition, Consultant shall comply with all City policies governing the use of the City network and technology systems. A violation by Consultant of this Section 16 shall be a material violation of this Agreement and shall justify legal and/or equitable relief.

## **17. CONSULTANT INFORMATION**

a. City shall have full ownership and control, including ownership of any copyrights, of all information prepared, produced, or provided by Consultant pursuant to this Agreement. In this Agreement, the term "information" shall be construed to mean and include: any and all work product, submittals, reports, plans, specifications, and other deliverables consisting of documents, writings, handwritings, typewriting, printing, photostatting, photographing, computer models, and any other computerized data and every other means of recording any form of information, communications, or representation, including letters, works, pictures, drawings, sounds, or symbols, or any combination thereof. Consultant shall not be responsible for any unauthorized modification or use of such information for other than its intended purpose by City.

b. Consultant shall fully defend, indemnify and hold harmless City, its officers and employees, and each and every one of them, from and against any and all claims, actions, lawsuits or other proceedings alleging that all or any part of the information prepared, produced, or provided by Consultant pursuant to this Agreement infringes upon any third party's trademark, trade name, copyright, patent or other intellectual property rights. City shall make reasonable efforts to notify Consultant not later than ten (10) days after City is served with any such claim, action, lawsuit or other proceeding, provided that City's failure to provide such notice within such time period shall not relieve Consultant of its obligations hereunder, which shall survive any termination or expiration of this Agreement.

c. All proprietary and other information received from Consultant by City, whether

received in connection with Consultant's proposal, will be disclosed upon receipt of a request for disclosure, pursuant to the California Public Records Act; provided, however, that, if any information is set apart and clearly marked "trade secret" when it is provided to City, City shall give notice to Consultant of any request for the disclosure of such information. Consultant shall then have five (5) days from the date it receives such notice to enter into an agreement with the City, satisfactory to the City Attorney, providing for the defense of, and complete indemnification and reimbursement for all costs (including plaintiff's attorneys' fees) incurred by City in any legal action to compel the disclosure of such information under the California Public Records Act. Consultant shall have sole responsibility for defense of the actual "trade secret" designation of such information.

d. The parties understand and agree that any failure by Consultant to respond to the notice provided by City and/or to enter into an agreement with City, in accordance with the provisions of subsection c, above, shall constitute a complete waiver by Consultant of any rights regarding the information designated "trade secret" by Consultant, and such information shall be disclosed by City pursuant to applicable procedures required by the Public Records Act.

## **18. MISCELLANEOUS**

a. Entire Agreement. This Agreement contains the entire agreement between the parties. Any and all verbal or written agreements made prior to the date of this Agreement are superseded by this Agreement and shall have no further effect.

b. Modification. No modification or change to the terms of this Agreement will be binding on a party unless in writing and signed by an authorized representative of that party.

c. Compliance with Laws. Consultant shall perform all services described herein in compliance with all applicable federal, state and local laws, rules, regulations, and ordinances, including but not limited to, (i) the Americans with Disabilities Act of 1990 (42 U.S.C. 12101, et seq.) ("ADA"), and any regulations and guidelines issued pursuant to the ADA; and (ii) Labor Code sections 1720, *et seq.*, which require prevailing wages (in accordance with DIR determinations at [www.dir.ca.gov](http://www.dir.ca.gov)) be paid to any employee performing work covered by Labor Code sections 1720 *et seq.* Consultant shall pay to the City when due all business taxes payable by Consultant under the provisions of Chapter 6-04 of the Santa Rosa City Code. The City may deduct any delinquent business taxes, and any penalties and interest added to the delinquent taxes, from its payments to Consultant.

d. Discrimination Prohibited. With respect to the provision of services under this Agreement, Consultant agrees not to discriminate against any person because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status of that person.

e. Governing Law; Venue. This Agreement shall be governed, construed and enforced in accordance with the laws of the State of California. Venue of any litigation arising out of or connected with this Agreement shall lie exclusively in the state trial court in Sonoma County in the State of California, and the parties consent to jurisdiction over their persons and over the subject matter of any



such litigation in such court, and consent to service of process issued by such court.

f. Waiver of Rights. Neither City acceptance of, or payment for, any service or performed by Consultant, nor any waiver by either party of any default, breach or condition precedent, shall be construed as a waiver of any provision of this Agreement, nor as a waiver of any other default, breach or condition precedent or any other right hereunder.

g. Incorporation of Attachments and Exhibits. The attachments and exhibits to this Agreement are incorporated and made part of this Agreement, subject to terms and provisions herein contained.

## **19. AUTHORITY; SIGNATURES REQUIRED FOR CORPORATIONS**

Consultant hereby represents and warrants to City that it is (a) a duly organized and validly existing Corporation, formed and in good standing under the laws of the State of California, (b) has the power and authority and the legal right to conduct the business in which it is currently engaged, and (c) has all requisite power and authority and the legal right to consummate the transactions contemplated in this Agreement. Consultant hereby further represents and warrants that this Agreement has been duly authorized, and when executed by the signatory or signatories listed below, shall constitute a valid agreement binding on Consultant in accordance with the terms hereof.

If this Agreement is entered into by a corporation, it shall be signed by two corporate officers, one from each of the following two groups: a) the chairman of the board, president or any vice-president; b) the secretary, any assistant secretary, chief financial officer, or any assistant treasurer. The title of the corporate officer shall be listed under the signature.

## **20. COUNTERPARTS AND ELECTRONIC SIGNATURES**

This Agreement and future documents relating thereto may be executed in two or more counterparts, each of which will be deemed an original and all of which together constitute one Agreement. Counterparts and/or signatures delivered by facsimile, pdf or City-approved electronic means have the same force and effect as the use of a manual signature. Both City and Consultant wish to permit this Agreement and future documents relating thereto to be electronically signed in accordance with applicable federal and California law. Either Party to this Agreement may revoke its permission to use electronic signatures at any time for future documents by providing notice pursuant to the Agreement. The Parties agree that electronic signatures, by their respective signatories are intended to authenticate such signatures and to give rise to a valid, enforceable, and fully effective Agreement. The City reserves the right to reject any signature that cannot be positively verified by the City as an authentic electronic signature.

Executed as of the day and year first above stated.

**CONSULTANT:**

**CITY OF SANTA ROSA**  
a Municipal Corporation

Name of Firm: Carlile Macy, Inc.

TYPE OF BUSINESS ENTITY (*check one*):

- Individual/Sole Proprietor
- Partnership
- Corporation
- Limited Liability Company
- Other (please specify: \_\_\_\_\_)

By: \_\_\_\_\_

Print Name: Chirs Rogers

Title: Mayor

*Signatures of Authorized Persons:*

APPROVED AS TO FORM:

By: \_\_\_\_\_

\_\_\_\_\_  
Office of the City Attorney

Print Name: Mark Hale

ATTEST:

Title: President

By: \_\_\_\_\_

\_\_\_\_\_  
City Clerk

Print Name: Pete Crudo

Title: Secretary

City of Santa Rosa Business Tax Cert. No.

06525590  
\_\_\_\_\_

- Attachments:
- Attachment One - Insurance Requirements
  - Exhibit A - Scope of Services
  - Exhibit B - Compensation

**ATTACHMENT ONE  
INSURANCE REQUIREMENTS FOR  
PROFESSIONAL SERVICES AGREEMENTS**

**A. Insurance Policies:** Consultant shall, at all times during the terms of this Agreement, maintain and keep in full force and effect, the following policies of insurance with minimum coverage as indicated below and issued by insurers with AM Best ratings of no less than A-:VI or otherwise acceptable to the City.

<b>Insurance</b>	<b>Minimum Coverage Limits</b>	<b>Additional Coverage Requirements</b>
1. Commercial general liability	\$ 1 million per occurrence \$ 2 million aggregate	Coverage must be at least as broad as ISO CG 00 01 and must include completed operations coverage. If insurance applies separately to a project/location, aggregate may be equal to per occurrence amount. <b>Coverage may be met by a combination of primary and umbrella or excess insurance but umbrella and excess shall provide coverage at least as broad as specified for underlying coverage. Coverage shall not exclude subsidence.</b>
2. Business auto coverage	\$ 1 million	ISO Form Number CA 00 01 covering any auto (Code 1), or if Consultant has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$ 1 million per accident for bodily injury and property damage.
3. Professional liability (E&O)	\$ 1 million per claim \$ 1 million aggregate	Consultant shall provide on a policy form appropriate to profession. If on a claims made basis, Insurance must show coverage date prior to start of work and it must be maintained for three years after completion of work.
4. Workers' compensation and employer's liability	\$ 1 million	As required by the State of California, with Statutory Limits and Employer's Liability Insurance with limit of no less than \$ 1 million per accident for bodily injury or disease. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City for all work performed by the Consultant, its employees, agents and subcontractors.

**B. Endorsements:**

1. All policies shall provide or be endorsed to provide that coverage shall not be canceled, except after prior written notice has been provided to the City in accordance with the policy provisions.

2. Liability, umbrella and excess policies shall provide or be endorsed to provide the following:
  - a. For any claims related to this project, Consultant's insurance coverage shall be primary and any insurance or self-insurance maintained by City shall be excess of the Consultant's insurance and shall not contribute with it; and,
  - b. **The City of Santa Rosa, its officers, agents, employees and volunteers are to be covered as additional insureds on the CGL policy.** General liability coverage can be provided in the form of an endorsement to Consultant's insurance at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used.

**C. Verification of Coverage and Certificates of Insurance:** Consultant shall furnish City with original certificates and endorsements effecting coverage required above. Certificates and endorsements shall make reference to policy numbers. All certificates and endorsements are to be received and approved by the City before work commences and must be in effect for the duration of the Agreement. The City reserves the right to require complete copies of all required policies and endorsements.

**D. Other Insurance Provisions:**

1. No policy required by this Agreement shall prohibit Consultant from waiving any right of recovery prior to loss. Consultant hereby waives such right with regard to the indemnitees.
2. All insurance coverage amounts provided by Consultant and available or applicable to this Agreement are intended to apply to the full extent of the policies. Nothing contained in this Agreement limits the application of such insurance coverage. Defense costs must be paid in addition to coverage amounts.
3. Policies containing any self-insured retention (SIR) provision shall provide or be endorsed to provide that the SIR may be satisfied by either Consultant or City. Self-insured retentions above \$10,000 must be approved by City. At City's option, Consultant may be required to provide financial guarantees.
4. Sole Proprietors must provide a representation of their Workers' Compensation Insurance exempt status.
5. City reserves the right to modify these insurance requirements while this Agreement is in effect, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

COFFEY NEIGHBORHOOD PARK



FIR RIDGE PARK



FINALI PARK



Exhibit A

# City of Santa Rosa Recreation & Parks

OCTOBER 5, 2021



PROPOSAL

FOR

LANDSCAPE ARCHITECTURAL

DESIGN AND

ENGINEERING SERVICES

FOR

SOUTH DAVIS NEIGHBORHOOD

PARK MASTER PLAN AND

CONSTRUCTION DOCUMENTS



CIVIL ENGINEERS

URBAN PLANNERS

LAND SURVEYORS

LANDSCAPE ARCHITECTS

**CARLILE · MACY**

15 Third Street, Santa Rosa, CA 95401

T: 707/542-6451 F: 707/542-5212

[www.carlilemac.com](http://www.carlilemac.com)

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15 Third Street  
Santa Rosa, CA 95401  
Tel: 707 542 6451  
Fax: 707 542 5212

October 5, 2021

City of Santa Rosa  
Recreation and Parks Department  
Attention: South Davis Park Review Committee  
55 Stony Point Road  
Santa Rosa, CA 95401

SUBJECT: RFPR 158088 for Landscape Architectural Design & Engineering Services  
Master Plan & Construction Documents for South Davis Neighborhood Park

Nestled against the highway, a short walk from the Carlile ▪ Macy office, and along streets of eclectic homes, South Davis Park is a small but clearly appreciated open space for the surrounding neighborhood. The grounds and existing playground, although slightly worn, are in surprisingly good shape considering that the last major updates happened almost 20 years ago. The City's desire to bring in new play equipment and engage the community in reviewing the park master plan presents a wonderful opportunity for bringing new life and energy to a vibrant neighborhood. We at Carlile ▪ Macy have assembled a talented team of design professionals to guide the neighborhood through a focused visioning process with the ultimate goal of delivering a new playground that meets the needs of and excites the neighborhood. We are eager to bring our passion, collaboration, and creativity to this project.

The key elements to a successful neighborhood process will be engaging the adjacent neighborhood and community to explore any unmet recreational needs or desires that can be envisioned for South Davis Park while managing expectations and respecting necessary funding timelines. Our landscape architects and design team are skilled public outreach facilitators who strive to inform and engage the community, find commonality between various interests, and stay focused on project goals. There is more to delivering an updated park than a successful community engagement process, however. Knowledge, skill, and the ability to execute a design with details that enhance the park's sense of place while also understanding the practical necessities required to comply with current codes, standards, and future maintenance are equally important. Carlile ▪ Macy's design team has extensive experience in delivering parks in Santa Rosa, including work on nine neighborhood parks, Prince Memorial Greenway, A Place To Play, and the Reunification of Courthouse Square.

Our experienced team for this project will be comprised of key individuals involved in the design of recent Santa Rosa park projects such as Finali Park, Courthouse Square Reunification, Coffey Park, and the Fountaingrove area parks damaged by the Tubbs Fire. Briana Morrison will be the project manager and Mark Hale will be the principal-in-charge.

We accept the terms of the City's Standard Professional Services Agreement, and our proposal will remain valid for 90 days from the date of submittal. Should you have any questions regarding our proposal, please direct them to Briana Morrison at her direct telephone line: (707) 535-1541 or email address: [bmorrison@carlilemacy.com](mailto:bmorrison@carlilemacy.com).

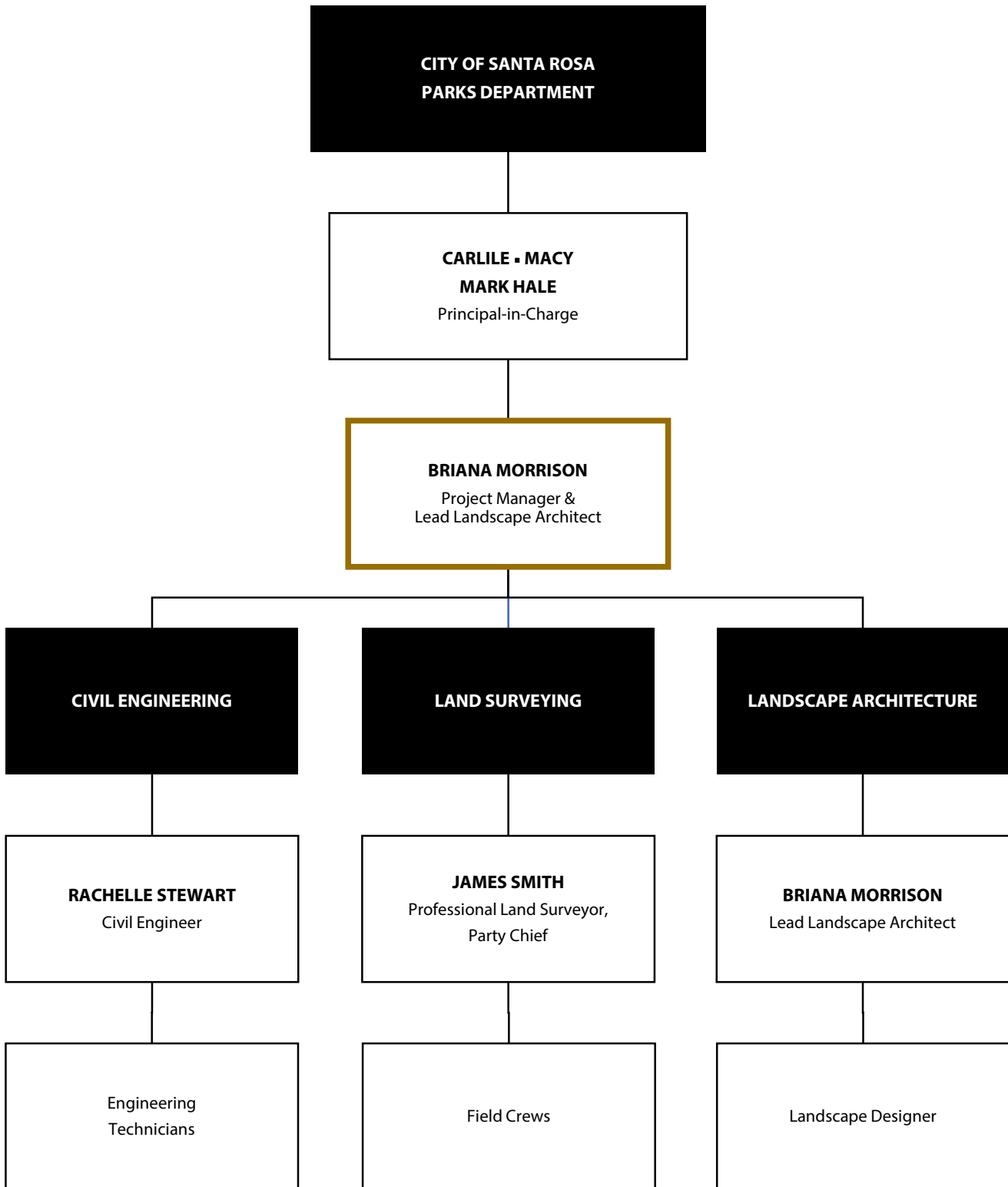
Carlile ▪ Macy is proud to call the City of Santa Rosa our home, and it would be an honor to assist our neighbors in reimagining the playground at South Davis Park.

Very truly yours,

CARLILE • MACY

MARK L. HALE and BRIANA N. MORRISON  
Principal-In-Charge and Associate Principal

# Project Team Organization





**The Carlile ■ Macy team includes the key design professionals responsible for several significant parks and public spaces that have transformed Santa Rosa, including the reunification of Courthouse Square, Coffey Neighborhood Park, and Finali Neighborhood Park.**

### Carlile ■ Macy

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**Mark Hale, Principal-in-Charge** Our team will be supervised and supported by Mark Hale, Carlile ■ Macy President, who will be the principal-in charge. Mark brings three decades of civil engineering site design and project management experience to his current role as Principal and President of Carlile ■ Macy. He manages projects from entitlement approval through construction document creation and approval, construction services, and contract administration. He has been involved in the design and construction of numerous parks and public facilities in Northern California. Additionally, Mark has designed public projects that both enhanced the pedestrian experience and provided accessible routes along public streets. He is a past member of the City of Santa Rosa Design Review Board and Leadership Santa Rosa alumni. Mark has B.S. in Civil Engineering and Mechanical Engineering (double major). He is a California Registered Civil Engineer, RCE #43973.

**Briana Morrison, Project Manager & Lead Landscape Architect** Briana will be the project manager, lead landscape architect, and primary contact and will serve as an extension of City staff on this project. She will be responsible for coordinating the work of the design team. Briana joined Carlile ■ Macy in 2014, bringing with her the knowledge and experience gained while working as a municipal parks project manager and a residential landscape designer. With over ten years of design, construction administration, and community outreach experience, Briana leads project teams through collaboration and a comprehensive perspective. Her strengths include harmonizing stakeholder goals with quality design while keeping projects organized and moving forward. Briana has a B.L.A. in Landscape Architecture. She is a California Licensed Landscape Architect, LLA#6329.

**Rachelle Stewart, Project Civil Engineer** Rachelle will lead our civil design team and assist with design and construction documentation for grading and drainage improvements. Rachelle joined Carlile ■ Macy in 2014 to further apply her engineering education and experience to design engineering. Her background is in hydraulic modeling, water measurement, agricultural engineering, and surveying. As a project manager, Rachelle delivers design solutions for grading, drainage, storm water management, site design, and planning. She has significant experience in designing for accessible pathways in public facilities which enhance the pedestrian experience. Rachelle has a B.S. in Civil Engineering and an M.S. in Civil Engineering, Water Resources Specialization. She is a California Registered Civil Engineer, RCE#85227.

**James Smith, Professional Land Surveyor, Party Chief** James will perform the surveys for the topographic mapping of the site. He will also be Party Chief for our field crew. With 28 years' experience in land surveying and civil engineering technology, James is well known for his innovative approach to project constraints. He currently serves as survey project manager and immediate supervisor of the field surveyors for Carlile ■ Macy. His daily workload consists of scheduling and calculation support for the field crews, supervising the work of the office assistants, preparing record of surveys, reducing and adjusting GPS measurements, and conducting legal research for boundary and right-of-way surveys. James's experience in working in engineering has helped him gain greater understanding of how to conduct surveys for engineering design. James has a Certificate in Civil Engineering Technology. He is a California Professional Land Surveyor, PLS#8185.

Full resumes for our key staff are provided as attachments to this proposal.

# South Davis Neighborhood Park Schedule



2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Task 01: Concept Plan/Master Plan and Community Engagement</b>												
<i>City Council approval</i>												
1.1 Kick-off meeting with City staff to introduce team												
1.2 Review City-provided reports and record plans												
1.3 Complete topographic survey of current conditions												
1.4 Document site opportunities and constraints in collaboration with design team												
1.5 Prepare site background drawing for use as base for design team												
1.6 Hold Public Outreach Meeting #1												
1.7 Review input collected at Public Outreach Meeting #1 / other, prepare summaries, synthesize into design program												
1.8 Develop alternative conceptual plans to implement the design program & review with City staff												
1.9 Present alternative plans at Public Outreach Meeting #2												
1.10 Review input collected at Public Outreach Meeting #2 / other and prepare summaries												
1.11 Refine alternative plans into one Master Plan in response to public input, & review with City staff												
1.12 Present refined Master Plan at Public Outreach Meeting #3 and document public input												
1.13 Review input collected at Public Outreach Meeting #3 / other and prepare summaries												
1.14 Prepare comprehensive report of public outreach process and all stakeholder feedback												
1.15 Revise Master Plan based on public input, and review with City staff												
<i>Coordinate with playground equipment manufacturers, prepare concept plans and renderings, etc.</i>												
1.16 Prepare rough cost estimate for Board of Community Services and refined cost estimate for City Council												
1.17 Present Master Plan to Board of Community Services for approval												
1.18 Present Master Plan to City Council for approval												
<i>Attend regular and/or monthly meetings with Parks Dept. Staff (in person and/or virtual)</i>												

South Davis Neighborhood Park

Schedule



2022

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
10	14	14	11	16	6	20	1	5	10	14	19
17	21	21	18	23	13	27	8	12	17	21	26
24	28	28	25	30	20	3	15	19	24	28	

Task 02: Construction Documents	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2.1 Prepare existing conditions plan												
2.2 Prepare demolition plan for affected areas												
2.3 Prepare preliminary layout of updated paving, site features, and amenities												
2.4 Prepare preliminary grading (and storm drainage, if needed) design development												
2.5 Prepare preliminary accessible route design development												
2.6 Prepare preliminary selections for all site elements, paving, and site furnishings												
2.7 Prepare preliminary selection of plant palette and irrigation system components, if needed												
2.8 Submit design development (30%) submittal package for review and comment by Parks Dept. staff												
2.9 Prepare site layout/horizontal control plan with enlargements for key areas												
2.10 Prepare site grading (and storm drainage plans, if needed) with enlargements for key areas												
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2.13 Coordinate play equipment colors with City staff												
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2.15 Prepare landscape planting plans and details, if needed												
2.16 Prepare irrigation plans & details including WELO compliance documentation, if needed												
2.17 Prepare erosion control plan												
2.18 Submit technical specifications per Public Works standards for all construction (60%, 90%, 100%)												
2.19 Submit cost estimates per Public Works standards for all construction (60%, 90%, 100%)												
2.20 Submit construction documents for review and comment by City staff (60%, 90%, 100%)												
<i>Estimated City staff review time, based on RFP milestones</i>												
2.21 Submit for building permit and address plan check comments												

Task 03: Bidding & Construction	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
3.1 Support City staff during bidding process												
<i>Construction contract execution through City</i>												
3.2 Attend pre-construction meeting with selected contractor and appropriate City staff												
3.3 Review and approve submittals												
<i>High potential for weather-related construction delays</i>												
3.4 Attend weekly construction meetings and provide as-needed construction observation												
3.5 Prepare final construction punch list and assist with project close-out documents												
<i>Completion deadline for State Parks and Recreation's Per Capita Grant Program</i>												

South Davis Neighborhood Park

Schedule



2023

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**Work Plan**

*(see Schedule on pages 6-8 for additional detail)*

The schedule is based on City-provided milestones included in the RFP with minor adjustments explained in each task below. The weeks of Thanksgiving, Christmas, and New Years Day are blocked out in the schedule in order to avoid any major milestones occurring during holiday weeks when a majority of people take personal time or are traveling.

**Task 01: Concept Plan / Master Plan and Community Engagement (8 months)**

The goal of this task is to develop a neighborhood- and City Council-approved Master Plan revision for updates to South Davis Park through public participation.

We are using a mid-January date for City Council approval to be optimistic but also reasonable. Time between public meetings as presented in the RFP at first seems excessive, however it gives generous time for stakeholder review (from both City staff and online surveys) and design response. Additionally, this timing gives playground manufacturers appropriate lead time to prepare quality renderings for Public Outreach Meetings.

- 1.1 Kick-off meeting with City staff to introduce team—Collect and review project background data, drawings, etc. Confirm project understanding and schedule. Identify potential for delays and discuss a plan to navigate them.
- 1.2 Review City-provided reports and record plans
- 1.3 Complete topographic survey of current conditions.



*The Coffey Park community was very involved in their park renovation. People of all ages participated—and even presented!—at public meetings.*

- 1.4 Document site opportunities and constraints in collaboration with design team
- 1.5 Prepare site background drawing for use as base for design team
- 1.6 Hold Public Outreach Meeting #1
- 1.7 Review input collected at Public Outreach Meeting #1 / other, prepare summaries, and synthesize into design program—Review input received both at the meeting and from an online survey and prepare a summary of comments received, apparent common themes and any issues, and percentages of support for various ideas to be included in the conceptual plans.
- 1.8 Develop alternative conceptual plans to implement the design program & review with City staff—Staff review is anticipated in the form of a roundtable meeting (virtual or in person) with representatives from the Parks Department.
- 1.9 Present alternative plans at Public Outreach Meeting #2—This meeting will be designed to receive public input on alternative plans toward refining the alternatives into one plan. A summary of feedback received at Neighborhood Meeting #1 and from the online survey will be presented.
- 1.10 Review input collected at Public Outreach Meeting #2 / other and prepare summaries
- 1.11 Refine alternative plans into one Master Plan in response to public input, and review with City staff
- 1.12 Present refined Master Plan at Neighborhood Meeting #3 and document public input—This meeting will be designed to receive community feedback prior to presenting to the Board of Community Services for its review and approval. A summary of feedback received at Neighborhood Meeting #2 and from the online survey will be presented.
- 1.13 Review input collected at Public Outreach Meeting #3 / other and prepare summaries—Review input received both at the meeting and from an online survey and prepare a summary of comments received, apparent common themes and any issues, and percentages of support for the revised Master Plan and features to be included in the revised Master Plan.
- 1.14 Prepare comprehensive report of public outreach process and all stakeholder feedback.
- 1.15 Revise Master Plan based on public input, and review with City staff.

Coordinate with playground equipment manufacturers, prepare concept plans, and renderings, etc.— We will work directly with multiple playground manufacturers to prepare conceptual playground designs, layouts, and renderings for review and comment by stakeholders. Milestones for this coordination will be tied to Public Outreach Meetings. After Public Outreach Meeting #3, we will have a final playground concept selected based on stakeholder feedback.

- 1.16 Prepare rough cost estimate for Board of Community Services and refined cost estimate for City Council
- 1.17 Present Master Plan to Board of Community Services for approval—The Master Plan and rough cost estimate will be presented to the Board of Community Services along with a summary of the feedback received from the neighborhood during the process.
- 1.18 Present Master Plan to City Council for approval—The Master Plan and refined cost estimate will be presented to the City Council along with a summary of the feedback received from the neighborhood and the Board of Community Services during the process. If required by City Council, we will revise the Master Plan and present again at a later meeting.

Attend regular and/or monthly meetings with Parks Dept. Staff (in person and/or virtual)—These meetings will include previously mentioned City staff feedback meetings as well as preparation meetings prior to Public Outreach, Board of Community Services, and City Council presentations. Additional meetings may occur to review playground concepts and 30% design development drawings.



*A large crowd at the second community meeting for the Courthouse Square Reunification project in Santa Rosa*

## Task 02: Construction Documents (+/- 6.5 months)

This task will complete the preparation of 100% construction documents and bid documents per the City's standards.

We have proposed a 30% design development milestone shortly after Board of Community Services approval in order to elicit preliminary Parks Department feedback prior to the 60% submittal. Additionally, we have adjusted the submittal milestones to occur every 8 weeks to allow for holidays, 2 weeks minimum of City review, and design time to incorporate any comments received into each submittal set. These milestones can be adjusted if necessary.

- 2.1 Prepare existing conditions plan
- 2.2 Prepare demolition plan for affected areas
- 2.3 Prepare preliminary layout of updated paving, site features, and amenities
- 2.4 Prepare preliminary grading (and storm drainage, if needed) design development
- 2.5 Prepare preliminary accessible route design development
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- 2.17 Prepare erosion control plan

- 2.18 Submit technical specifications per Public Works standards for all construction (60%, 90%, 100%)
- 2.19 Submit cost estimates per Public Works standards for all construction (60%, 90%, 100%)
- 2.20 Submit construction documents for review and comment by City staff (60%, 90%, 100%)
- 2.21 Submit for building permit and address plan check comments

**Task 03: Bidding & Construction (+/- 8 months)**

This task will provide bidding support to City staff as well as construction observation and administration services.

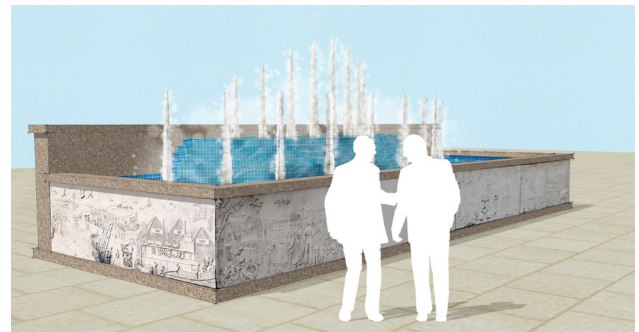
Based on previous experience, we anticipate the City bidding process through construction start to be about 4 months. Our projected construction schedule is generous and includes time for weather- and materials-related construction delays which may occur. Current material availability and supply chain issues may persist into the future, so allowing flexibility in the construction timeline is important. Construction is expected to be complete before the December 31, 2023 deadline.

- 3.1 Support City staff during bidding process
- 3.2 Attend pre-construction meeting with selected contractor and appropriate City staff
- 3.3 Review and approve submittals
- 3.4 Attend weekly construction meetings and provide as-needed construction observation
- 3.5 Prepare final construction punch list and assist with project close-out documents

**Ability to Meet Project Schedule**

We are able to meet the project schedule presented in the RFP and will confirm the proposed timeline with City staff at a kick-off meeting. We anticipate roughly 8 months for concept plan / master plan and community engagement, roughly 6.5 months for completion of 100% construction documents and bid documents, and about 8 months from bidding to construction completion. We believe the projected schedule is reasonable while allowing for unexpected delays and still meeting the required December 31, 2023 deadline.

We are also able to be flexible with the schedule to meet City expectations and workloads. Our team understands that staff schedules, additional review and coordination time, or any number of other factors may affect the project timeline. We will work closely with City staff to keep the project on track and on schedule.



*3-dimensional models and renderings have been used on several recent projects (City of Santa Rosa's Courthouse Square fountain and A Place to Play emergency test well shown above) as visual aides in the design process*

### Project Understanding

South Davis Park is designated as a 1.34-acre neighborhood park and located within the southwest part of the City of Santa Rosa. The park was constructed in 1988 as a passive park with a lawn and trees. The park is bordered by a wall which separates the park from Highway 101. The wall is screened by large eucalyptus trees. To the west, the park is bordered by South Davis Street and a long-established residential neighborhood with narrow streets. The park shape is unique—very narrow and linear—and is bisected by the end of Earle Street and the entry/exit for the Highway 101 pedestrian-only over crossing. The existing playground was installed in 2001, and the Master Plan was prepared in 2003. The playground contains play areas for ages 2-5 years and 5-12 years along with a separate swing area. The remainder of the park contains mature landscaping, numerous Redwood trees, irrigated lawn, picnic tables, benches, temporary trash receptacles, a basketball court, and wooden bollards along South Davis Street.

The park is showing signs of amenities and features that need repair or replacement and that are simply outdated. The playground, while in good shape, has colors associated with area gangs. The City has a State Parks and Recreation Per Capita Grant and matching funds to replace the play equipment, update the safety surfacing, improve accessible paths to the playground, and make any other park repairs necessary to achieve the aforementioned items. The

community engagement process will be focused on the playground while also allowing the neighborhood to give other feedback on the overall park. If the neighborhood requests new amenities in the master plan, the master plan will be amended and presented to the Board of Community Services and City Council for approval. The scope for the future construction portion of the project must remain focused on replacing the playground and any other updates required by current codes. Depending on available funds, some site furnishings (picnic tables, benches, trash receptacles, park rules signs) may be updated and included in the construction documents.

This project will be funded by a State Parks and Recreation Per Capita Grant and matching City funds. The selected consultant will contract with the City under a Professional Services Agreement and assist the City with neighborhood engagement, preparing and presenting alternative playground concepts and park master plan revisions, developing a bid set of construction documents, and providing construction administration services.

Carlile ■ Macy is uniquely qualified to assist the City and guide the neighborhood with updating South Davis Park. Besides our extensive professional experience, we have strong personal bonds to our community of Santa Rosa. South Davis Park and the Roseland area is a short walk from our office. Listening to the community's input with open ears will be our first and highest priority. We will translate the feedback and desires into illustrative visual aides, then develop a constructable design that synthesizes the community's wants and meets the City's needs.

For the neighborhood outreach component of this project, we will lead a series of public meetings in coordination with City staff. Each meeting will include current conceptual graphics, in plan and 3-D and/or perspective views, and supporting imagery for review and comment by the neighborhood. The three proposed public outreach meetings, feedback by City staff, public survey results, and any written or phoned-in comments will form the basis of stakeholder feedback for this project. Park improvements will include new playground equipment, updated pathways in accessibility compliance, and modifications to planting and irrigation to accommodate those changes. Updated site furnishings and amenities may be added at the discretion of the City.

If required to accommodate new playground equipment or if requested by the neighborhood, an



*At Coffey Park, multiple rounds of style, equipment, and color refinement in coordination with stakeholders led to an exciting final playground design*



amended master plan will be presented to the Board of Community Services and then City Council for approval. Preparation of construction documents will begin after Board Community Services approval, and the plans ideally will be ready for bidding in early 2023 (see Schedule for additional detail).

The community engagement and construction document process will be managed to allow sufficient time for bidding and construction prior to the December 31, 2023 completion deadline.

### Public Engagement

- Adjacent residents within 1/2 mile or more will be included in the public engagement process.
- Other stakeholders in the design process include but are not limited to the City Parks Department, City Public Works Department, Board of Community Services, and City Council.
- Neighborhood and stakeholder feedback will be synthesized and analyzed for common themes and trends, and data should be summarized and presented through percentages and other concise methods. These summaries will be shared at future public meetings, posted online, and ultimately presented to the Board of Community Services and City Council as support for the amended Master Plan.

### Existing Conditions and Park Design

- All park features will remain except as necessary to provide new play equipment, accessibility, and any required code upgrades required by the City. If funds are available, some site furnishings may be updated or replaced as described below.
- The existing eucalyptus and redwood trees provide the majority of vegetation at the site. They also help with screening sound and dust from Highway 101. The intent would be to preserve them if possible.
- Existing park rules signs are damaged and outdated; however, the frames are in fine condition. If funds are available, park rules signs should be updated to current standards.
- Existing park benches are outdated and may be replaced, if funds are available.
- Existing electrical for area lights and the irrigation controller are functioning.
- The existing irrigation system is for the lawn area, and it is functioning. If the lawn is modified for

any reason, the irrigation in that area will need to be updated. In that case, all new irrigation equipment will meet current Parks standards.

- If new planting is included, compliance with the City's Water Efficient Landscape Ordinance and Low-Impact Design Guidelines will be required.
- Pathways to any new or modified features will be ADA-compliant and tie into existing site features to remain.
- If funds are available, temporary trash receptacles will be replaced with trash, recycling, and compost receptacles or others as required by the City.
- The extents of the master plan amendment will be determined during the public engagement process. The project focus will be replacing the play equipment. There is no preferred vendor for equipment; however, the consultant will be expected to present a variety of equipment vendors and concepts for neighborhood and City feedback. Engineered wood chips (fibar) are preferred for impact attenuating surfacing.
- Any modified park elements and paths to them must be ADA/CBC-compliant. The City Building Department may require that existing corner curb ramps and midblock crossings be brought into current code compliance.
- Funding for this project will come from a State Parks and Recreation Per Capita Grant and matching funds.

### Other Information

- The City will concurrently prepare CEQA compliance documents to accompany the design and construction documents. We will collaborate with City staff to provide necessary measurements, quantities, and similar design metrics and analysis information to support an environmental evaluation.
- Regular meetings with City Parks (and other) staff, a minimum of one per month for an anticipated +/-8 months, are expected during the community engagement process.

### Note

We recognize that due to the current health pandemic and a trend of area wildfires which may be exacerbated by historic drought conditions, the foreseeable future will involve varied and consistently changing public health guidelines, potential evacuations, power outages, and other unforeseen events that may affect

not only the project schedule, but also the way in which we perform our work. Additionally, we recognize that City staff are often called to respond to emergency events which may affect their availability for meetings and review.

The Carlile Macy design team is equipped to effectively work from alternative locations, to participate in and lead hybrid and video/teleconference meetings, to provide digital deliverables, to be flexible and respectful of City staff's time, and to adapt as necessary to meet our project commitments and maintain the level of creativity, quality, and service our clients value and expect.

### Detailed Project Approach

Our goal for the amended master plan and new playground at South Davis Park is to deliver an exciting, neighborhood-approved playground while planning for the future in direct response to input from stakeholders. The following approach is based on our current understanding of the potential project scope and future needs in order to provide comprehensive services. If requested by the City, the approach may be modified or adjusted in the future.

We will begin by reviewing information previously provided by the City as well as examining record plans and other existing documentation. In addition to observational site visits, our design team will prepare documentation of the existing site in order to develop a full understanding of park conditions. We will use this information to guide the neighborhood in the master plan process and identify any potential opportunities or constraints for the project.

### Topographic Survey

We will prepare a topographic field survey of the existing park, between South Davis Street and Highway 101. We will locate existing improvements, including park features, curbs, walkways, street frontage and adjacent street intersections, driveways, planters, fences, visible surface utilities, invert grades of storm drains, trees greater than 4" in diameter, drainage, ground slopes, and grades. Topographic mapping will be produced with 1' contours and spot grades. Benchmark will be based on City of Santa Rosa datum. This will be used for our base drawing, any master plan revisions, and our construction documents. An electronic copy of this survey will be provided to the City for their reference and future use.

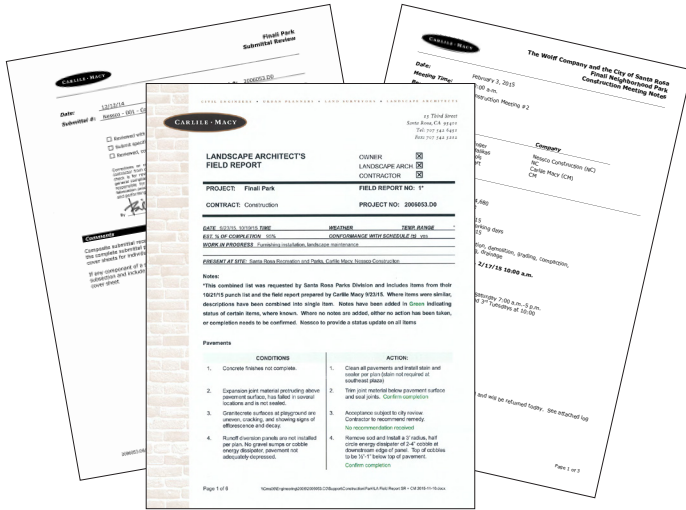
### Public Engagement

Throughout the public engagement process, we will work in coordination with City staff to elicit neighborhood feedback through surveys and comments from residents. We understand the importance of allowing each citizen to be heard and their opinions captured and considered. Likely, feedback will be provided in various formats, and we will synthesize and analyze all feedback and provide easy-to-understand summaries that can be shared to keep stakeholders updated and informed. We will also prepare exhibits and graphic visual aids that can be shared to clearly illustrate our proposed concepts and designs to residents.

The project will focus on providing a new playground for the neighborhood. In order to provide equipment that meets the needs of and inspires the neighborhood, multiple design concepts from several trusted manufacturers will be presented to stakeholders for feedback beginning as early as the second public meeting. We anticipate working with manufacturers' representatives to revise concepts in preparation for the last public meeting in order to receive final feedback and an understanding of stakeholder preferences. Ideally, a playground manufacturer and general design concept will be selected at the start of construction documents. During the construction document process, equipment design, colors, and layout can be refined in coordination with City staff. Plans and specifications for a final playground design and layout will be incorporated into the construction documents.

### Construction Documents, Permitting, and Bidding

Maintaining open communication with Parks staff and early outreach to the Public Works and Building departments will greatly aid in reducing project delays. Our past experience with City of Santa Rosa projects, including recent parks projects, will be beneficial for this project. Our familiarity with Parks design standards, Building Department submittal processes, and Public Works requirements for the bidding and construction process will limit unnecessary work that would otherwise extend the review process and project timeline. Our strong relationships with City staff and our in-house quality control will be vital to creating plans that are complete and easy to understand for plan submittals and construction.



Submittal reviews, field reports, construction meeting notes, and various construction administration documents prepared for Final Park

## Construction Administration

The Carlile Macy office is a 15-minute walk or 5-minute drive from South Davis Park. We will be available for weekly construction meetings and as-needed site visits with the project contractor, City Building Inspector, and staff at a moment's notice. We will collaborate with the construction team to prepare project meeting minutes and will maintain comprehensive submittal, request for information (RFI), architect's supplement instructions (ASI), and field guidance logs for distribution to the team. As a liaison of the Parks Department on site, we will keep Parks Department staff informed of project progress and coordinate with them on any design changes. All project documentation will be provided in digital format to the City upon project completion.

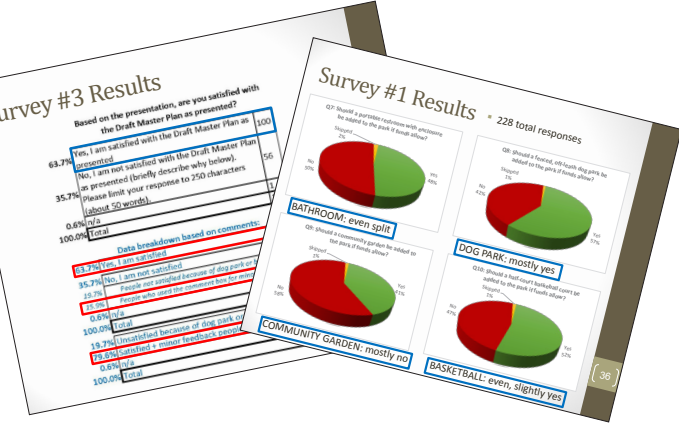
## Scope of Work

### Concept Plan / Master Plan and Community Engagement

As listed in the RFP, design services shall be comprehensive for the playground replacement project and any correlated and/or required site improvements. Design services shall include, but are not limited to, the following:

1. Research site opportunities and constraints.
2. Research available industry equipment for playground and other components.

3. Conduct and lead at 2-3 public meetings in conjunction with the City.
4. Collect, analyze, and create a public input report of all the feedback received from all community outreach meetings and on-line feedback from the community. Revise the conceptual plans at the request of City staff and as needed after each meeting.
5. Prepare at least three (3) playground and component concept plans. Each concept plan will be based on actual equipment available in the industry. The plans will not include rubberized surface attenuation but will include Fibar or similar attenuation for playground safety. Conceptual playground plans that show rubberized surfacing will not be presented.
6. Prepare an updated final graphic(s) based on feedback received from stakeholders for final City approval. The concept graphic(s) will show the desired amenities, including any proposed updates / changes to the existing area.
7. Request and receive final detailed concept plan from the playground manufacturer.
8. Attend meetings with City staff as needed to finalize conceptual plans.
9. Conduct and assist the City with the first virtual or hybrid neighborhood meeting to introduce the project to the neighborhood and gather feedback. Assist the City with marketing and outreach strategies and input to prepare and conduct the first neighborhood meeting. Analyze and prepare a data sheet of all community input received and provide percentages of preferred features to be included in the amended Master Plan. Prepare a summary of all the comments and show common themes that are apparent and any issues discovered from the input received.
10. Prepare 1-3 plan concepts using one-page graphics based on feedback received at the first neighborhood meeting, surveys, and feedback provided by the City and from on-line and other input collection sources provided by the City. Prepare the graphics in preparation for the second neighborhood meeting. The graphics will be amended and updated to the satisfaction of the City prior to the second meeting.
11. Conduct and assist the City with the second virtual or hybrid neighborhood meeting and present to the neighborhood the master plan graphic in digital form (hardcopies included if in person).

- Assist the City with marketing and outreach strategies and input to prepare and conduct the second neighborhood meeting. Prepare graphics and assist the City with survey questions for the City to post on the Recreation and Parks web page to receive on-line feedback from those not able to attend the meeting.
- Collect and analyze all the feedback received from the second neighborhood meeting in conjunction with all electronic feedback the City receives as follow up after the meeting by those that could not attend in-person and from any surveys the City may produce. Prepare a summary of all the comments and show common themes that are apparent and any issues discovered from the input received.
  - Prepare an updated master plan one-page graphic based on feedback received at the first and second neighborhood meetings, feedback provided by the City and from on-line and other City input collection sources. Prepare the graphics for the third neighborhood meeting. The graphic will be amended and updated to the satisfaction of the City prior to the third meeting.
- 
- For Coffey Neighborhood Park, all public workshop feedback, paper and online survey results, and e-mailed or phoned comments were synthesized and analyzed to find common trends. Easy-to-understand infographics of the results were used in presentations and posted online.*
- Collect and analyze all the feedback received from the third neighborhood meeting in conjunction with all electronic feedback the City receives as follow up after the meeting by those that could not attend in-person and from any surveys the City may produce. Prepare a summary of all the comments, show common themes that are apparent, and share any issues discovered from the input received.
  - Prepare a comprehensive report of all feedback collected from all sources, including on-line participation and in-meeting participation in surveys. The report will contain all the info collected from the community at each meeting opportunity, online, and the combined results. The combined results will also show the results per City quadrant, per survey question with total conclusions. This report will be posted on-line and available as an attachment to the BOCS and City Council meetings.
  - Prepare an updated master plan or conceptual plan one-page graphic based on feedback received at the first, second, and third neighborhood meetings, feedback provided by the City, and from on-line and other community input collection sources. Prepare the graphics in preparation for the Board of Community Services (BOCS) meeting. The graphic will be amended and updated to the satisfaction of the City until final, at no additional cost to the City.
  - Present the master plan or conceptual plan at the Board of Community Services (BOCS) public meeting in conjunction with City staff. Prepare any other information and graphics necessary to support the plan design. The BOCS maybe a hybrid, virtual, or in-person meeting. We will be prepared to present in a hybrid manner, all virtual, or all in-person manner in conjunction with City staff.
  - Prepare an updated plan based on direction and comments received by the BOCS (if needed – the City will determine if another BOCS meeting is needed and may cancel at no cost to the City).
  - Prepare an updated master plan amendment (if needed) and present at City Council for final approval in conjunction with City staff. Prepare any other information and graphics necessary to support the master plan amendment design.
  - Attend regular virtual or in-person meetings (at least one per month) with City staff to keep the City informed of the process and to ensure the

project is provided in a timely manner, per the schedule. The current expectation is that virtual meetings are preferred, however, if for any reason the City or Consultant needs to meet in person, we will be available.

22. Attend all public meetings relating to the Plan and present to the neighbors the details of the graphics provided.
23. Prepare all master plan graphics with color for all meetings. Provide the graphics in large format prints for each community meeting (only if any are held in person) and electronically in PDF form for City use.

### Deliverables

The cost of all deliverables is included in the cost proposal:

- All conceptual graphics/plans may be submitted electronically, via PDF to the City. Hardcopies are NOT required.
- Graphic concept plans will be provided in a manner or amount to elicit meaningful feedback from the City, without any additional costs to the City, and will be revised if original concept is unclear.
- Provide other graphics and information regarding the details of the plan as may be requested by the City, such as but not limited to: sample photos of the type of amenities proposed, graphics showing general plan information overlaid over site aerial photos, dimensions and distance relations of amenities, and similar graphics that may be useful for community engagement.
- All graphics will be provided in large format hardcopy (if in-person meetings are scheduled) and/or electronically via PDF to the City.
- Final graphics will be provided for City use in both PDF and the original graphic files compatible with AutoCAD, Photoshop, and/or Illustrator.

### Construction Plans

Design services shall be comprehensive for the construction documents, specifications, cost estimates, and design project schedule and may include, but are not limited to, the following:

1. Cover sheet per City of Santa Rosa standards.
2. Existing project site plan, excluding any demolition or other improvements, which identifies key elements of the existing site (demolition sheet provided separately).
3. Topographic plan.
4. Engineering plans.
5. Grading and drainage plans.
6. Demolition plan including all items to be demolished, including landscaping and irrigation.
7. Overall site plans and enlargements to include all elements proposed in the master plan amendment or conceptual plan, including but not limited to manufacturer's model numbers and colors for all playground equipment.
8. Hardscape plans to include all pathways and connections to any existing elements in compliance with ADA (ingress/egress to improvements as required)
9. Integration of the City-approved manufacturer's plans and specifications for play equipment. The manufacturer's plans and specifications will be part of the construction documents.
10. Full planting and irrigation plan for restoration of any planting / irrigation areas disturbed, if needed. Plant symbols will be shown at full maturity. New irrigation valve boxes and other lids will match surroundings; e.g., brown for mulch areas and green for turf areas.
11. Standard and site-specific details, section cuts, etc. as needed to clarify plans, as required or requested by the City.
12. Include list on cover sheet of all permits required to be obtained by the future construction contractor in order to construct the site based on the plans.
13. Include a list on the cover sheet of all items that must be inspected / permitted by the City Building staff in order to open the park to the public.
14. Submit three (3) full hardcopy sets of 60% construction document submittals with specifications, cost estimate, and general schedule for City staff internal review and to the satisfaction of the City. Electronic copies included as requested.
15. Submit 90% construction document submittals for City staff review and to the satisfaction of the City. Electronic copies included as requested.
16. Submit 100% construction documents submittals for City staff internal. The 100% submittal shall be revised as needed in order to prepare the final bid set at no additional cost to the City. Electronic copies included as requested.

17. Submit final 100% bid set construction documents to the City's Building Department for final review, per the Building Department requirements.
18. Revise the bid set until approved and stamped by the City Building Department. Based on our experience with the City, we have included two sets of plan revisions in the cost proposal.
19. Respond to all technical questions related to plan clarifications during City's construction bidding process within 24 business hours of request.
20. Provide technical construction inspections and oversight of construction work on behalf of Recreation and Parks as needed to ensure compliance with the intent of the design as shown in the permit set. Regular and on-going construction inspection will be performed by the Public Works Engineering staff and is not required of the Consultant.
21. Revise and resubmit plan set if during construction a construction plan set flaw or lack of construction plan set information / clarity prevents the construction contractor from completing the construction, at no additional cost to the City.
22. Attend and support project progress meetings, as needed.
23. Provide all plan sheets and subconsultant services needed to provide a complete and comprehensive set of construction documents.
24. Require, within the plan set or specifications, that Contractor provide as-built plans.

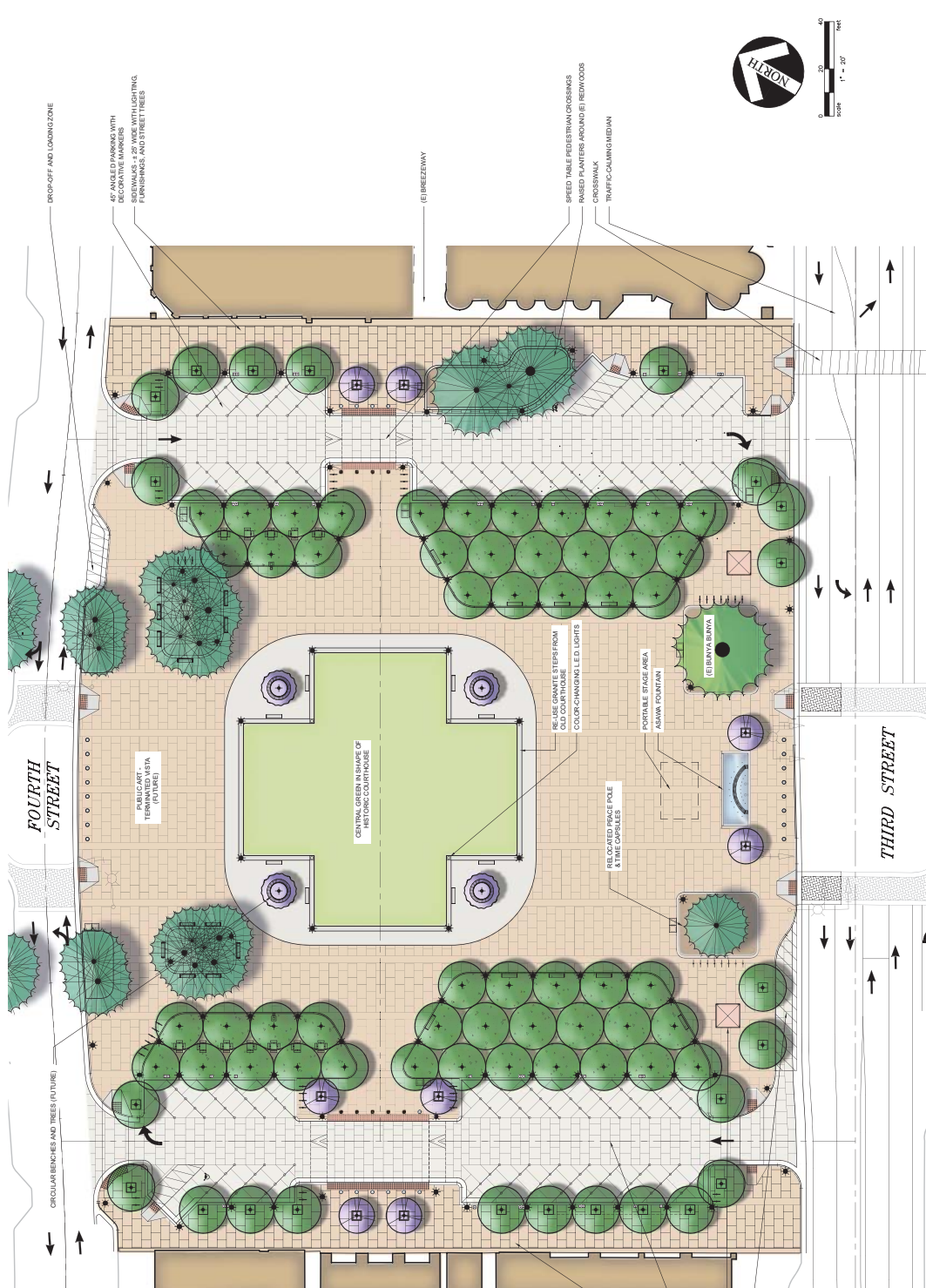
### Deliverables

The cost of all deliverables is included in the cost proposal:

- Three (3) full size, hardcopy sets of 60%, 90%, and 100% construction document submittals with specifications, cost estimate, and general schedule. Electronic copies included as requested.
- Three (3) full size, hardcopy sets of bid set, one (1) full mylar set, and PDF set.
- Unlocked AutoCAD base design and topographic files for City's future use.
- Specifications in Word document format.
- Regular project schedule updates, in electronic PDF format.
- Two (2) full size, hardcopies of contractor-prepared as-builts and one (1) electronic PDF copy.



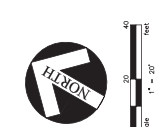
*Coffey Neighborhood Park just prior to opening to the public in October 2020. (Photo by City of Santa Rosa)*



- LEGEND**
- SEWALKS, STREETS & FLEX-ZONE PARKING COLORED CONCRETE
  - PLAZA PAVING: PAVEMENT MARKERS
  - TREE BODICE AREAS: GRANITE/CLAY
  - SHADE PAVING: SLOPED CONCRETE
  - MULCH PLANTER: AROUND (E) TREES
  - REINFORCED TUF
  - ROADWAY PAVING (GR AND 4TH)
  - (E) TREES TO REMAIN (REDWOODS UNLESS OTHERWISE NOTED)
  - FLOWERING ACCENT TREES
  - DECIDUOUS PLAZA SHADE TREES
  - POLE MOUNTED STREET & AREA LIGHTS
  - PARKING METER
  - REMOVABLE BENCHES
  - TRASH AND RECYCLING RECIPT TACKLE
  - HYDRATION STATIONS
  - PONC TABLES
  - BIKE PARKING
  - BENCHES
  - TREE GRATES
  - COLOR-CHANGING LED LIGHTS

4' X 20' WIDE SIDEWALK WITH LIGHTING, FURNISHINGS, AND STREET TREES EXCHANGE AND INTOWN AVENUE TO HAVE COLORED & WITH PARKING DELINEATED BY DECORATIVE MARKERS. EQUIPMENT STORAGE. DROP-OFF AND LOADING ZONE.

**NOTE**  
 THE SITE PLAN IS INTENDED TO CONVEY THE GENERAL CONCEPTS AND APPROXIMATE LOCATIONS OF THE EXACT LAYOUT, QUANTITIES, & MATERIALS FOR MODIFICATION & REFINEMENT.



**CARLISLE · MACY**  
 SANTA ROSA, CA

# COURTHOUSE SQUARE REUNIFICATION

## Master Plan

City of Santa Rosa  
 APPROVED JULY 12, 2016

### LEGEND

- LARGE, NATIVE TREE
- LARGE SHADE TREE
- STREET TREE
- ORNAMENTAL TREE
- EXISTING TREE
- PLAIN CONCRETE PAVING, PEDESTRIAN-RATED
- PLAIN CONCRETE PAVING, VEHICULAR-RATED
- COLORLED CONCRETE PAVING, PEDESTRIAN-RATED
- STABILIZED SURFACING
- TURF
- PLANTING AREAS
- NATIVE / POLLINATOR PLANTING AREAS
- STORMWATER TREATMENT / RAIN GARDEN AREAS
- MULCH IN PLANTER AREAS
- PLAYGROUND SURFACING (ENGINEERED WOOD FIBER)
- MULCH IN DOG PARK
- BENCH
- PICNIC TABLE
- ADA-COMPLIANT PICNIC TABLE
- CONCRETE GAME TABLE
- DRINKING FOUNTAIN
- TRASH CAN
- B.B.Q.
- BIKE RACK
- PORTABLE RESTROOM AND ENCLOSURE
- PEDESTRIAN-SCALE SECURITY LIGHTING
- VEHICULAR BARRIERS
- SEAT WALL
- DOG PARK FENCING (4 FT.)
- PERIMETER FENCING

\*NOTE: THIS SECTION INCLUDES A PUBLIC ART COMPONENT. THE DESIGN AND LOCATION OF WHICH IS TO BE DETERMINED. NEIGHBORHOOD FEEDBACK INDICATES A PREFERENCE FOR FUNCTIONAL PUBLIC ART, SUCH AS SCULPTURE, WALL MOUNTED ART, AND OTHER ARTS THAT REFLECT THE IDENTITY AND RESILIENCE OF THE COFFEY PARK NEIGHBORHOOD AND RESPECTFULLY COMMEMORATE THE TURBS FIRE.



Sheet: **1**  
Of 1 Sheets

FEBRUARY 27, 2019



## Coffey Neighborhood Park PROPOSED MASTER PLAN



**CARLISLE MACY**  
15 Third Street, Santa Rosa, CA 95401  
T: 707/542-6451 F: 707/542-5212  
www.carlismacy.com

C.M. 2018031.00



# Coffey Neighborhood Park—Neighborhood Park and Firestorm Rebuild

## Santa Rosa, California

### Project description

Originally designed and constructed in the mid-1980s, Coffey Neighborhood Park is a roughly 5.9-acre park located in the center of the Coffey Park residential community in northwest Santa Rosa. The beloved park was severely damaged in the October 2017 firestorm along with the destruction of the majority of homes in the surrounding area.

In order to rebuild a park which met the modern needs of the evolving community, a new Master Plan was developed through an extensive public process which involved three community meetings, online surveys, and regular meetings with a stakeholder group. Multiple rounds of Schematic Designs, Conceptual Master Plans, and a final Master Plan were created, presented, and adjusted based on feedback until survey results indicated the majority of stakeholders were satisfied with the result.

### Design details

- Redesigned barbecue and picnic areas situated under existing trees for instant shade
- Durable, graffiti-resistant concrete site furnishings
- Multiple community spaces, including a “community corner” with game tables, ping-pong tables, and open plaza space for future neighborhood events
- Pollinator garden and seating area inspired by local elementary students park designs
- Looped walking / jogging path around the park
- Fitness stations located along path allow for a full-body workout for people of various ages and physical abilities
- Custom playground structures featuring a nature-theme and “ninja warrior” style fitness and play opportunities
- Picnic tables and shaded seating areas between two playgrounds for multiple age groups



Swings were a “must” from the neighborhood during the community engagement process, and here kids enjoy a variety of them



Coffey Park community members review several Schematic Designs

- Turf play mound near playground
- Large, recreational lawn maintains character original park design
- Dog park appropriately sized for the area

### Role of Carlile ■ Macy

Carlile ■ Macy lead the community engagement process which included multiple feedback meetings, public surveys, stakeholder meetings, and presentations to City boards. Community input was used to develop a Master Plan and prepare construction documents. Our landscape architects will provide construction observation and administration services through project close-out. The project began construction in October 2019 and is expected to be completed by summer 2020.

Carlile ■ Macy has provided land surveying, site planning, landscape architecture, and civil engineering services.

### Staff involvement

Principal-in-Charge: Curt Nichols  
Proj. Manager & Landscape Architect: Briana Morrison  
Lead Civil Engineer: Mark Hale

### Contacts

Jen Santos, Deputy Director  
Recreation and Parks  
City of Santa Rosa  
(707) 543-3781  
[jsantos@srcity.org](mailto:jsantos@srcity.org)

### Fees

Original Design Fee = \$197,400  
Additional Services = \$ 19,740  
Total = \$ 217,140

Construction Cost = \$3 million

# Courthouse Square Reunification – Urban Redevelopment

## Santa Rosa, California

### Project description

Carlile ■ Macy was selected in November 2015 for the design of the reunification of Santa Rosa’s historic Courthouse Square; the project was completed in April 2017. The project team included Carlile ■ Macy’s landscape architects and civil engineers teaming with Vargas Greenan Urban Design. The team provided community outreach with several focused meetings. The project required an intensive interdisciplinary design approach within Carlile ■ Macy in order to meet the fast track schedule. The final evolution of site design developed a large central open space with permeable paving and a central reinforced turf green in the footprint of the original courthouse outlined with salvaged granite from the courthouse steps. The central open space is flanked by sycamore bosques set in “Granitecrete” permeable paving. The courthouse footprint also features four custom programmable LED light columns with Luther Burbank botanical motifs. The design saved several of the existing large redwoods and one 150-year-old Bunya-Bunya tree. The terminus of the south axis of the square will feature a fountain with art panels by Ruth Asawa.

The project features a number of sustainable design elements, most notably innovative stormwater management that features the use of both extensive pervious paving and “Silva Cell” systems. The Silva Cell system not only provides stormwater retention and filtration but also provides an environment that will foster the growth of large-scale shade trees in an urban setting.

### Services provided

- Project scheduling to meet aggressive fast-track approval and construction timing
- Master planning and community outreach facilitation



Flexible open space allows the Square to be used for a variety of events (left); Custom art columns feature Luther Burbank plants light up at night (right)



Photo from the Press Democrat

- Landscape architecture including off-site tree procurement and fountain design
- Civil engineering including stormwater treatment design and calculations
- Urban design with master planning and special feature design
- Full schematic design, design development, contract documents, specifications, estimate of probable cost, bidding, and construction administration

### Staff involvement

Principal & Project Manager: Curt Nichols  
Lead Civil Engineer: Mark Hale  
Landscape Designer & Public Meetings: Briana Morrison

### Contacts

Jason Nutt, Director  
City of Santa Rosa  
Transportation & Public Works Department  
69 Stony Circle  
Santa Rosa, CA 95401  
(707) 543-3810  
[jnutt@srcity.org](mailto:jnutt@srcity.org)

### Fees

Original Design Fee = \$ 755,741  
Additional Services = \$ 175,000  
Total = \$ 930,741

Construction Cost = \$7,656,000



# Finali Park—Neighborhood Park

## Santa Rosa, California

### Project description

Finali Neighborhood Park sits on 2.8 acres of land adjacent to the Annadel Apartment complex. The park features a community garden, dog park, large playground structure, tot lot, walking paths, a barbecue area, picnic tables and multiple grassy areas. The park is named for the family that farmed the land for generations.

### Finali Park design details

- Low-water use landscape design, including large, drought-tolerant lawn and meadow areas
- Diversion panels in sidewalks to direct storm water runoff toward biofiltration basins
- Stylized paving patterns and colors
- Custom playground structures, featuring a farm and barnyard theme

### Role of Carlile ■ Macy

For the development of Finali Park, Carlile ■ Macy led the community engagement process, which included feedback meetings and public surveys. Community input was used to develop a Master Plan and prepare construction documents. Our landscape architects provided construction observation and administration services through project close-out.

### Staff involvement

Principal & Project Manager: Curt Nichols  
Landscape Architect: Briana Morrison

### Fees

Original Design Fee = \$122,500  
Additional Services = \$ 0  
Total = \$122,500

Construction Cost = \$860,000

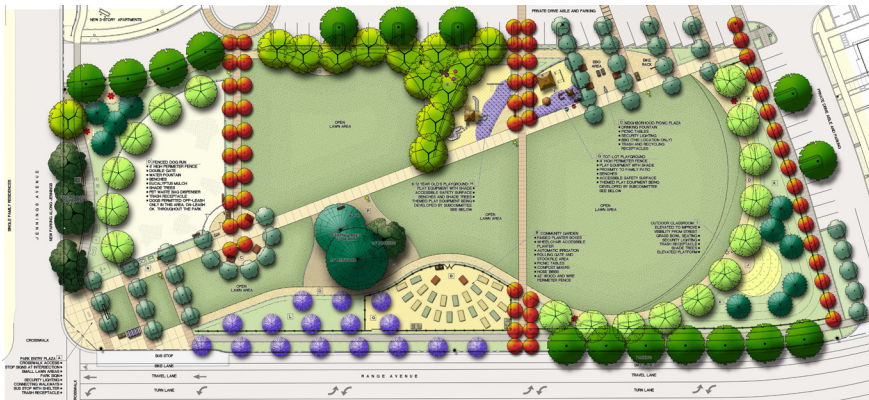


The playground equipment is themed after the Finali family's farm

### Contacts

Joe Organic, Director of Development  
The Wolff Company  
(509) 444-6519  
[jorganic@awolff.com](mailto:jorganic@awolff.com)

Jen Santos, Deputy Director  
Recreation and Parks  
City of Santa Rosa  
(707) 543-3781  
[jsantos@srcity.org](mailto:jsantos@srcity.org)



Finali Park is located in the heart of a multi-family residential area at the corner of Jennings Avenue and Range Avenue

## Résumés

## PROFESSIONAL ACCOMPLISHMENTS

Mark Hale brings three decades of civil engineering site design and project management experience to his current role as Principal and President of Carlile ■ Macy. Mark manages projects from entitlement approval through construction document creation and approval, construction services, and contract administration. He has been involved in the design and construction of numerous parks and public facilities in Northern California. Additionally, he has designed public projects that both enhanced the pedestrian experience and provided accessible routes along public streets. Mark is a past member of the City of Santa Rosa Design Review Board and Leadership Santa Rosa alumni.

## RELEVANT PROJECTS

- Nagasawa Community Park, Santa Rosa, CA. Project manager for design of both phases of community park in the Fountaingrove area. Phase 1 was completed in 2006 and consisted of a parking lot, non-trailer access boat launch, and utility design for future park expansion. Facilities were designed to minimize impacts to existing wetlands and to conform with the natural terrain. The design of Phase 2 is currently being finalized and will provide for a day camp area.
- Coffey Neighborhood Park, Santa Rosa, CA. Coffey Neighborhood Park is a roughly 5.9-acre park located in the center of the Coffey Park residential community in northwest Santa Rosa. The park was severely damaged in the October 2017 firestorm. Through an extensive public process, a new Master Plan was developed and used to create construction documents. The project began construction in October 2019 and is expected to be completed by summer 2020. Mark is the lead civil engineer and assisted in development of construction documents.
- Courthouse Square Reunification, Santa Rosa, CA. This landmark project has restored Santa Rosa's downtown square, originally dedicated in 1854, to its historic configuration. By removing the portion of Mendocino Avenue that has bisected the square since 1966 and reinstalling the side streets that originally framed the square, the east and west sides have been reunified to create a central gathering place in the heart of downtown where the community can enjoy a wide range of events. The design features a central green in the form of the footprint of the original courthouse surrounded by permeable paving and flanked by bosques of London Plane trees. Mark was the lead civil engineer.
- A Place to Play, Santa Rosa, CA. An 82-acre park, which will ultimately consist of 12 playing fields, 2 large ponds, and a variety of smaller recreational facilities. The park uses reclaimed water for irrigation on the site. Design of the grading, drainage, utilities, and streets and parking was balanced with the aesthetics and functions of the park. Drainage is collected in the reclaimed water storage pond and recycled for irrigation. The cost for the first two phases of construction was approximately \$8 million. Mark was the project manager.
- Al Patch Park, Vacaville, CA. This 34-acre project includes five softball fields, an all-weather synthetic running track surrounding a football/soccer field, restroom/concession building, and associated parking. The site was extremely flat with the potential for flooding problems. Carlile ■ Macy created an innovative on-site drainage detention system for alleviating this potential problem. Mark was the project engineer.

## EDUCATION

B. S. in Civil Engineering and Mechanical Engineering (double major),  
University of California, Davis, 1985

## PROFESSIONAL REGISTRATION & AFFILIATIONS

- Registered Civil Engineer, California, RCE #43973
- American Society of Civil Engineers
- American Council of Engineering Companies of California



Mark Hale  
Principal, Civil Engineer



Coffey Neighborhood Park  
Santa Rosa, CA



Courthouse Square Reunification  
Santa Rosa, CA



Al Patch Park  
Vacaville, CA

## PROFESSIONAL ACCOMPLISHMENTS

Briana joined Carlile ■ Macy in 2014, bringing with her the knowledge and experience gained while working as a municipal parks project manager and a residential landscape designer. With over ten years of design, construction administration, and community outreach experience, Briana leads project teams through collaboration and a comprehensive perspective. Her strengths include harmonizing stakeholder goals with quality design while keeping projects organized and moving forward.

## RELEVANT PROJECTS

- Coffey Neighborhood Park, Santa Rosa, CA. Coffey Neighborhood Park is a roughly 5.9-acre park located in the center of the Coffey Park residential community in northwest Santa Rosa. The park was severely damaged in the October 2017 firestorm. Through an extensive public process, a new Master Plan was developed and used to create construction documents. The project began construction in October 2019 and opened to the public in October 2020. Briana was the project manager and lead the facilitation of community meetings, assisted in development of construction documents, and provided construction observation and administration services.
- Courthouse Square Reunification, Santa Rosa, CA. This landmark project has restored Santa Rosa's downtown square, originally dedicated in 1854, to its historic configuration. By removing the portion of Mendocino Avenue that has bisected the square since 1966 and reinstalling the side streets that originally framed the square, the east and west sides have been reunified to create a central gathering place in the heart of downtown where the community can enjoy a wide range of events. The design features a central green in the form of the footprint of the original courthouse surrounded by permeable paving and flanked by bosques of London Plane trees. Briana assisted with facilitation of community meetings as well as preparation of the master plan and graphic exhibits.
- Finali Park, Santa Rosa, CA. Finali Neighborhood Park sits on 2.8 acres of land adjacent to the 390-unit Annadel Apartment complex, and features a community garden, dog park, large playground structure, tot lot, walking paths, barbecue area, picnic tables and multiple grassy areas. The park is named for the family that farmed the land for generations. Briana assisted in preparing construction documents, developing details, and managing construction observation and administration services.
- Six Fire Damaged Parks Recovery, Santa Rosa, CA. Six park sites in the Fountaingrove area of Santa Rosa – Fir Ridge Park, Nagasawa Community Park, Francis Neilsen Park, Rincon Ridge Park, Rincon Ridge Open Space, the Parkerhill Trail – sustained various levels of damage in the October 2017 firestorm. Working closely with City staff to assess the sites and neighborhood needs, construction documents to repair the damage and address accessibility requirements have been developed. The project is expected to begin construction in Fall 2021. Briana is the project manager and project landscape architect.

## EDUCATION

B.L.A. in Landscape Architecture, Texas A&M University, College Station, 2009

## PROFESSIONAL REGISTRATION & AFFILIATIONS

- Licensed Landscape Architect, California LLA #6329
- LEED® AP



Briana Morrison  
Landscape Architect



Coffey Neighborhood Park  
Santa Rosa, CA



Courthouse Square Reunification  
Santa Rosa, CA



Finali Park  
Santa Rosa, CA

## PROFESSIONAL ACCOMPLISHMENTS

Rachelle joined Carlile ■ Macy in 2014 to further apply her engineering education and experience to design engineering. She joined Carlile ■ Macy with a background in hydraulic modeling, water measurement, agricultural engineering, and surveying. Since joining Carlile ■ Macy, she has gained significant experience in grading, drainage, storm water management, site design, and planning, and has advanced to the position of project manager. Rachelle has significant experience in delivering design solutions for accessible pathways in public facilities which enhance the pedestrian experience.

## RELEVANT PROJECTS

- Courthouse Square Reunification, Santa Rosa, CA. This landmark project has restored Santa Rosa's downtown square, originally dedicated in 1854, to its historic configuration. By removing the portion of Mendocino Avenue that has bisected the square since 1966 and reinstalling the side streets that originally framed the square, the east and west sides have been reunified to create a central gathering place in the heart of downtown where the community can enjoy a wide range of events. The design features a central green in the form of the footprint of the original courthouse surrounded by permeable paving and flanked by bosques of London Plane trees. Rachelle assisted with the infrastructure design which included providing pedestrian pathways to existing facilities, while maintaining accessible routes.
- Six Fire Damaged Parks Recovery, Santa Rosa, CA. Six park sites in the Fountaingrove area of Santa Rosa – Fir Ridge Park, Nagasawa Community Park, Francis Neilsen Park, Rincon Ridge Park, Rincon Ridge Open Space, the Parkerhill Trail – sustained various levels of damage in the October 2017 firestorm. Working closely with City staff to assess the sites and neighborhood needs, construction documents to repair the damage and address accessibility requirements have been developed. The project is expected to begin construction in Fall 2021. Rachelle prepared the grading and drainage plans with an emphasis on accessibility and drainage preservation.
- Montage Healdsburg, Healdsburg, CA. Montage is a 258-acre luxury resort and residential project in northern Healdsburg. Rachelle assisted with the preparation of mass grading plans as well as street and utility improvement plans for a series of narrow, winding roads, all with an emphasis on aesthetics, tree and drainage course preservation, and stormwater quality.
- North Village, Healdsburg, CA. North Village is a 32-acre new development on an existing vacant parcel within the City of Healdsburg, located at north Healdsburg Avenue and is accessed through North Coast Railroad Authority property. Rachelle prepared the Healdsburg Avenue street improvement as well as the railroad crossing improvement plans. She also prepared hydraulic and hydrologic calculations confirming that the projects existing detention pond met current stormwater requirements.

## EDUCATION

M.S. in Civil Engineering, Water Resources Specialization, Oregon State University, Corvallis, 2013

B.S. in Civil Engineering, California State University, Chico, 2007

## PROFESSIONAL REGISTRATION & AFFILIATIONS

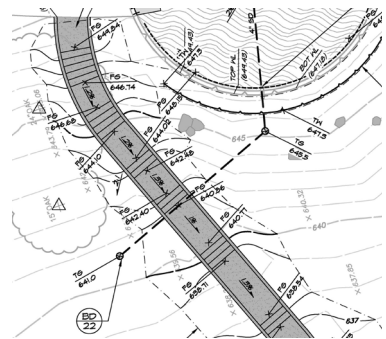
- Registered Civil Engineer, California RCE #85227



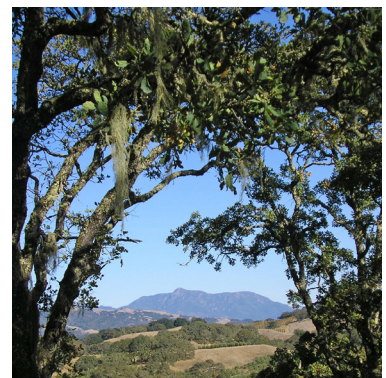
Rachelle Stewart  
Civil Engineer



Courthouse Square Reunification  
Santa Rosa, CA



Fire Damaged Parks Recovery  
Sonoma County, CA



Montage Healdsburg  
Healdsburg, CA

## PROFESSIONAL ACCOMPLISHMENTS

With 28 years' experience in land surveying and civil engineering technology, Mr. Smith is well known for his innovative approach to project constraints.

Mr. Smith currently serves as survey project manager and immediate supervisor of the field surveyors for Carlile ▪ Macy. His daily workload consists of scheduling and calculation support for the field crews, supervising the work of the office assistants, preparing record of surveys, reducing and adjusting GPS measurements, and conducting legal research for boundary and right-of-way surveys. James's experience in working in engineering has helped him gain greater understanding of how to conduct surveys for engineering design.

## RELEVANT PROJECTS

- Coffey Neighborhood Park, Santa Rosa, CA. Coffey Neighborhood Park is a roughly 5.9-acre park located in the center of the Coffey Park residential community in northwest Santa Rosa. The park was severely damaged in the October 2017 firestorm. Through an extensive public process, a new Master Plan was developed and used to create construction documents. The project began construction in October 2019 and opened to the public in October 2020. James worked as field and office surveyor in the compilation of topographic mapping and the determination of property lines and right-of-way lines.
- Courthouse Square Reunification, Santa Rosa, CA. This landmark project has restored Santa Rosa's downtown square, originally dedicated in 1854, to its historic configuration. By removing the portion of Mendocino Avenue that has bisected the square since 1966 and reinstalling the side streets that originally framed the square, the east and west sides have been reunified to create a central gathering place in the heart of downtown where the community can enjoy a wide range of events. The design features a central green in the form of the footprint of the original courthouse surrounded by permeable paving and flanked by bosques of London Plane trees.
- Plumas Street Streetscape, Yuba City, CA Land surveyor in charge of surveys for the right-of-way and topographic mapping of Plumas Street and surrounding side streets in Yuba City. The project involved the detailed mapping of curbs, sidewalks, storefronts, doorways and underground utilities for the design of a one-half-mile portion of the street for the engineering and architectural design of a new streetscape.

## EDUCATION

Certificate in Civil Engineering Technology, Santa Rosa Junior College, Santa Rosa, California, 1992

## PROFESSIONAL REGISTRATION & AFFILIATIONS

- Professional Land Surveyor, California PLS #8185
- California Land Surveyors Association



James Smith  
Professional Land Surveyor



Coffey Neighborhood Park  
Santa Rosa, CA



Courthouse Square Reunification  
Santa Rosa, CA



Plumas Street Streetscape  
Yuba City, CA



**South Davis Neighborhood Park**



**Staffing and Budget Spreadsheet**

Carlile · Macy								Subtotals Hours	Subtotals Fee
M. Hale Principal-in- Charge	B. Morrison, Associate, Proj. Landscape Architect	Landscape Designer	R. Stewart Project Civil Engineer	Engineering Technicians	J. Smith, Associate, Professional Land Surveyor	1-Man Field Crew	Admin		
\$200/hr	\$145/hr	\$95/hr	\$145/hr	\$130/hr	\$170/hr	\$195/hr	\$85/hr		

**Task 01: Concept Plan/Master Plan and Community Engagement**

1.1	Kick-off meeting with City staff to introduce team	2	4	4	2			1	13	\$1,735	
1.2	Review City-provided reports and record plans	1	4		4				9	\$1,360	
1.3	Complete topographic survey of current conditions					24	8	16	48	\$7,600	
1.4	Document site opportunities and constraints in collaboration with design team		8	16	2				26	\$2,970	
1.5	Prepare site background drawing for use as base for design team		4	8	4	8			24	\$2,960	
1.6	Hold Public Outreach Meeting #1		16	16	2				34	\$4,130	
1.7	Review input collected at Public Outreach Meeting #1 / other, prepare summaries, synthesize into design program		8	16				1	25	\$2,765	
1.8	Develop alternative conceptual plans to implement the design program & review with City staff	2	24	40	4			1	71	\$8,345	
1.9	Present alternative plans at Public Outreach Meeting #2		16	16					32	\$3,840	
1.10	Review input collected at Public Outreach Meeting #2 / other and prepare summaries		8	16				1	25	\$2,765	
1.11	Refine alternative plans into one Master Plan in response to public input, & review with City staff	2	24	40	4			1	71	\$8,345	
1.12	Present refined Master Plan at Public Outreach Meeting #3 and document public input		16	16					32	\$3,840	
1.13	Review input collected at Public Outreach Meeting #3 / other and prepare summaries		8	16				1	25	\$2,765	
1.14	Prepare comprehensive report of public outreach process and all stakeholder feedback		4	8				1	13	\$1,425	
1.15	Revise Master Plan based on public input, and review with City staff	1	16	24	2			1	44	\$5,175	
1.16	Prepare rough cost estimate for Board of Community Services and refined cost estimate for City Council	4	8	24	4				40	\$4,820	
1.17	Present Master Plan to Board of Community Services for approval	4	8	4				1	17	\$2,425	
1.18	Present Master Plan to City Council for approval	4	8	4				1	17	\$2,425	
Subtotal Hours		20	184	268	28	32	8	16	10	566	
Subtotal Fee		\$4,000	\$26,680	\$25,460	\$4,060	\$4,160	\$1,360	\$3,120	\$850		\$69,690

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### Carlile · Macy

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	\$200/hr	\$145/hr	\$95/hr	\$145/hr	\$130/hr	\$170/hr	\$195/hr	\$85/hr		
<b>Task 02: Construction Documents</b>										
2.1 Prepare existing conditions plan		2	8	2	8				20	\$2,380
2.2 Prepare demolition plan for affected areas	1	2	8	2					13	\$1,540
2.3 Prepare preliminary layout of updated paving, site features, and amenities	1	8	12	4	8				33	\$4,120
2.4 Prepare preliminary grading (and storm drainage, if needed) design development	1	4	12	8	4				29	\$3,600
2.5 Prepare preliminary accessible route design development	1	4	2	8	4				19	\$2,650
2.6 Prepare preliminary selections for all site elements, paving, and site furnishings	1	8	16	2					27	\$3,170
2.7 Prepare preliminary selection of plant palette and irrigation system components, if needed		8	16						24	\$2,680
2.8 Submit design development (30%) submittal package for review and comment by Parks Dept. staff	1	8	16	2					27	\$3,170
2.9 Prepare site layout/horizontal control plan with enlargements for key areas	1	8	24	8	16				57	\$6,880
2.10 Prepare site grading (and storm drainage plans, if needed) with enlargements for key areas	1	16	24	16	8				65	\$8,160
2.11 Prepare accessible route improvement plan and details	1	4	2	24	16				47	\$6,530
2.12 Coordinate play equipment plans from selected manufacturer		8	16						24	\$2,680
2.13 Coordinate play equipment colors with City staff		16	8						24	\$3,080
2.14 Prepare construction detailing of all site elements, paving, and site furnishings	1	8	24	2	8			2	45	\$5,140
2.15 Prepare landscape planting plans and details, if needed		8	16						24	\$2,680
2.16 Prepare irrigation plans & details including WELO compliance documentation, if needed		8	16						24	\$2,680
2.17 Prepare erosion control plan	1	2		2	8				13	\$1,820
2.18 Submit technical specifications per Public Works standards for all construction (60%, 90%, 100%)	4	24	24	8					60	\$7,720
2.19 Submit cost estimates per Public Works standards for all construction (60%, 90%, 100%)	4	8	16	4				6	38	\$4,570
2.20 Submit construction documents for review and comment by City staff (60%, 90%, 100%)	4	8	16	8	16				52	\$6,720
2.21 Submit for building permit and address plan check comments		4	16	4					24	\$2,680
Subtotal Hours	23	166	292	104	96	0	0	8	689	
Subtotal Fee	\$4,600	\$24,070	\$27,740	\$15,080	\$12,480	\$0	\$0	\$680		\$84,650

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	\$200/hr	\$145/hr	\$95/hr	\$145/hr	\$130/hr	\$170/hr	\$195/hr	\$85/hr			
<b>Task 03: Bidding &amp; Construction</b>											
3.1	Support City staff during bidding process	2	6	6	6				2	22	\$2,880
3.2	Attend pre-construction meeting with selected contractor and appropriate City staff	2	4	2	4				2	14	\$1,920
3.3	Review and approve submittals		12	24	12				8	56	\$6,440
3.4	Attend weekly construction meetings and provide as-needed construction observation		40	24	24				8	96	\$12,240
3.5	Prepare final construction punch list and assist with project close-out documents		8	16	8					32	\$3,840
	Subtotal Hours	4	70	72	54	0	0	0	20	220	
	Subtotal Fee	\$800	\$10,150	\$6,840	\$7,830	\$0	\$0	\$0	\$1,700		\$27,320
	Subtotal Tasks 1-3	\$9,400	\$60,900	\$60,040	\$26,970	\$16,640	\$1,360	\$3,120	\$3,230		\$181,660

**Subtotal  
Reimbursables\* @  
Total Consultant Fee**

**2.5%**

<b>\$181,660</b>
<b>\$4,542</b>
<b>\$186,202</b>

**10% Contingency Fee**

**\$18,620**

**Total Consultant Fee with Contingency**

**\$204,822**

\*Reimbursable fee includes cost of mylars

CARLILE • MACY

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 Santa Rosa, CA 95401  
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## Schedule of Charges 2022

Consulting, Legal	\$275.00 per hour
Principal	\$195.00-\$205.00 per hour
Associate	\$145.00-\$180.00 per hour
Project Engineer	\$130.00-\$150.00 per hour
Civil Engineer	\$110.00-\$130.00 per hour
Design Engineer	\$95.00-\$115.00 per hour
Civil Designer	\$130.00-\$160.00 per hour
Engineering Technician	\$90.00-\$130.00 per hour
Project Landscape Architect	\$120.00-\$140.00 per hour
Landscape Architect	\$105.00-\$120.00 per hour
Landscape Designer	\$95.00-\$110.00 per hour
Professional Land Surveyor	\$135.00-\$160.00 per hour
Project Surveyor	\$115.00-\$130.00 per hour
Assistant Surveyor	\$85.00-\$115.00 per hour
3 Man Survey Crew	\$390.00 per hour
2 Man Survey Crew	\$290.00 per hour
1 Man Survey Crew	\$195.00 per hour
Project Administrator	\$85.00 per hour

Additional charges are made for:

- Printing
- Reproduction
- Plotting
- Courier

*Prices subject to change effective January 1, 2023*