



November 6, 2013

Gary Armstrong, Development Services Director
City of Costa Mesa
77 Fair Drive
Costa Mesa, California 92628-1200
Transmittal Via Email: GARY.ARMSTRONG@costamesaca.gov

Subject: Statement of Qualifications for Planning Consulting Services

Dear Mr. Armstrong:

Thank you for this opportunity to submit our response to the City of Costa Mesa's request to provide planning consultant services at the Senior/Principal level planner. We understand the City has a need for a full-time, senior/principal level starting immediately. Our firm specializes in providing these services to public agencies in California. We have professional staff available to assist the City of Costa Mesa in a timely, professional and experienced manner. Given our expertise and background, we begin work immediately and we exceed the expectations of our clients.

Introduction to the Firm:

The Lilley Planning Group is a full service, professional consulting firm providing land use, building, economic development and environmental services to cities throughout California. Our mission is to provide outstanding, quality service to the clients and communities we serve and ensure we add value and make a positive impression with each assignment. Our corporate office is located in the City of Fullerton. Our President, Jennifer Lilley, AICP, has been a professional planner for over twenty-four years and has focused the last twenty years of her career assisting cities with their service needs by providing, overseeing and managing contract services. In addition to Jennifer's experience we have brought together a talented team to assist our clients and build the strength of resources and skills our firm has to offer.

Statement of Qualifications:

We have assembled a team of experienced professionals with a long history of providing high quality contract services to public agencies. This gives our team a unique and thorough understanding of the processes we will be implementing and the challenges faced in city departments. Our services include all functions of a community development department including:

- Gathering, analyzing, and interpreting data related to local social, economic, population, and land use trends;
- Preparing written reports on various moderately complex planning matters and elements of the comprehensive city plan;
- Assisting in the preparation of graphic materials concerned with planning problems and elements of the comprehensive plan;
- Preparing information and providing assistance to governmental agencies and individual

- citizens on matters relating to property use regulations and other functions of planning;
- Preparing graphic presentations and comprehensive reports on community characteristics as related to zoning problems;
 - Processing details of zoning and subdivision ordinances;
 - Conducting or participating in special studies of land use, and land economics, and other factors relating to zoning and current planning problems; and
 - Performing related work as required.

I will be the project manager and ensure you receive the highest level of service and projects run smoothly and stay on schedule. I would like to introduce you to Mr. Jerry Guarracino. Mr. Guarracino has more than 25 years of experience providing current and long-range planning services to public agencies. He is skilled in entitlement processing, project management, CEQA, plan review, zoning text amendments and preparing professional reports. He has an outstanding reputation for providing exceptional service to the public and is a great addition to every agency he serves.

Our company is dedicated to adapting our services to your organization to best suit your needs, meet your standards and provide services that seamlessly fit into your process. We appreciate your time in reviewing our qualifications and fees. We are confident you will find our capabilities, technical expertise, and staff will add value to your team. I look forward to the opportunity to speak with you about our services and the needs you anticipate immediately or in the future.

Sincerely,



Jennifer A. Lilley, AICP
President

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Fullerton, California 92832
www.lilleyplanning.com



Company Profile

The Lilley Planning Group is a full service, professional planning firm providing land use, environmental and on-site planning consulting exclusively to public agencies throughout California. Our mission is to provide outstanding, quality service to the clients and the communities we serve and ensure that we add value and make a positive impression with each assignment.

Jennifer Lilley, AICP, President of the firm, has been a professional planner for over twenty-four years and has focused the last twenty years of her career assisting more than 50 agencies with their planning needs. Because of our extensive experience and exclusive dedication to provide planning staff to public agencies, Lilley Planning is uniquely qualified to provide on-call services. We have assembled a team of experienced professionals to deliver high quality contract services. All of our staff has professional planning experience in the public sector, giving them a unique and thorough understanding of the processes we will be implementing and the challenges faced in city planning departments.

We have a proven track record providing professionals that have the technical competency to meet the requested services of our clients as well as the ability to fit into the organization that they are assigned. We believe you will find that we employ highly qualified and experienced professionals whose skills, qualifications and previous responsibilities are a strong match to the needs of any agency. We do this by employing the following practices:

- ◊ Our clients have the opportunity to interview our staff before they are assigned.
- ◊ Our planners have experience working for public agencies prior to working with us.
- ◊ The Lilley Planning Group knows that our reputation is our most valuable asset. To protect it we do not over commit our staff and we only commit to work that our staff has the qualifications to perform.

- * Our staff maintains their professional development and we provide extensive training in project management, land use law, CEQA, writing and public presentations skills.
- * We maintain regular office hours to be accessible and available when needed.
- * We consistently meet departmental standards including: deadlines, quality of work products, courtesy and accessibility, accuracy of reports and information given to the public, and responsiveness by gaining a firm understanding of expectations and maintaining consistent communication with our clients.
- * The Lilley Planning Group is committed to providing planning services that are cost effective while maintaining productivity standards.

Added benefit of using the Lilley Planning Group:

- * Our firm only bills for the time our staff spends doing the work of the city. We do not bill you for invoice preparation, supervision or training of our team, travel, our administrative functions or our internal management.
- * We do not charge our clients for commuting, clerical service, resolving issues or meeting to discuss assignments with our Contract Manager.
- * Our invoices will provide for you a review of the case history, summary of the total amount of time and cost incurred and the remaining funds available on account to keep applicants and city staff apprised of the status of each project.
- * We meet all deadlines and standards of quality for the client.
- * Our staff integrates seamlessly into department operations.
- * We effectively contain consulting costs and provide billing support for the city's cost recovery system.
- * We have established excellent customer relations on behalf of the city with citizens and applicants.
- * We work to ensure we never have even the appearance of conflicts of interest.

Services

Planning Services: we provide on-call staff on an as-needed basis to public agencies. We employ journey level experienced assistant, associate and senior level staff available for part-time and/or full-time work. We also have seasoned professionals available to provide interim management for planning, community development or city management assignments. Our staff is experienced with both advanced and current planning assignments. We offer environmental analysis, review, documentation and management. We manage cases and conduct all levels of review from field inspections, plan analysis, production of reports and resolutions, develop recommendations and supporting findings for action by staff or city officials. We provide entitlement processing for conditional use permits, site development permits, subdivision maps, sign programs, variances and other discretionary and administrative applications. We are skilled at working with applicants to help them find solutions to meet the code or conform to design guidelines or other special policies. We approach this work by:

- Reviewing and processing all aspects of current planning applications
- Advising and assisting the public and other City departments
- Assisting with issues and problems for projects
- Assisting with establishing General Plan goals, policies and implementation programs
- Reviewing, analyzing and coordinating related planning activities
- Preparing written staff reports for consideration by the Commissions and City Council
- Managing all aspects of assigned projects including noticing and CEQA
- Conducting research and special studies
- Prepare zoning code amendments, General Plan updates and other policy documents as necessary, including research and public workshops
- Attend and make presentations to the Planning Commission and/or City Council and respond to questions as requested
- Provide guidance and oversight to City Planning staff.

- * We offer interns to assist cities at no charge and with our supervision.

Building Services: We offer our clients full building department, plan check and inspection services including:

- * **Department Counter Services:** our staff offer customer-oriented assistance to the general public with filing applications and submitting necessary documents for all building department services and permits, to ensure compliance with applicable laws, codes and ordinances. We work with the public to help them with their requests, solve issues and find appropriate options where possible.
- * **Plan Check Services:** we have capable and knowledgeable professionals that can consultation with the public and contractors as needed to assist in the design process. Plan checking is completed in a professional, efficient, and accurate manner and accordance with all state and federal regulations, as well as codes and ordinances adopted by City.
- * **Inspections:** our field team is knowledgeable with what it takes to review the work in the field for compliance with approved plans, as well as all federal, state and local codes, ordinances or regulations. We represent the City and ensure that we are customer-friendly and compliance based. Problem solving and creative where possible and professional and approachable at all times.
- * **Review of Documents:** all certifications, test reports, manufacturers' specifications, surveys and any other applicable documents will be collected, reviewed and utilized to assure the proper use of methods and materials during the construction process will be ensured through our team. We take steps to properly record our findings and maintain records for future information.
- * **Record Keeping:** plan and permit files will be maintained in an organized and accessible manner. All original plans and permit records will be kept in City offices at all time and logs and communication is maintained to ensure that other staff has the ability to find necessary documents in our absence.

- **Interfacing with Other Agencies:** our team has strong relationships in the industry and offer our clients productive interface with other agencies to obtain approvals prior to issuance of permits when it is determined that the scope of work proposed falls in part within the jurisdiction of other agencies.
- **Public Relations/City Representations:** we take great pride in representing our clients. All interaction with the public and any other public agency will be provided with professionalism and in a manner that best represents your agency. Our staff ensure that all technical interpretations are made in a professional and courteous manner, whether in the office, field, or at public hearings.

Code Compliance/Enforcement Services: our professional staff has worked in municipal government throughout the State of California for many years. We have the ability to come into your organization and make interpretations, findings and assessments for code compliance cases. Some of our clients are very proactive when it comes to enforcement and some prefer to take a more reactive approach. Our team is familiar with the steps, process and approach in either case. They will work to ensure the issues are addressed in a professional manner, with respectful and productive tools to achieve the best results. Any written communications will take the tone and style of your organization to reflect the intention of the organization. We use clear language that is information and helpful while including code references to provide context and clarification where appropriate. Our team has provided field inspections, meetings and site visits for many years on complex and simple code issues and we work to resolve the matter in a timely and productive manner. Finally, we ensure that proper and accurate records are kept consistently and comprehensively throughout all cases. This ensures that there are appropriate means to follow the process, understand all the steps that have been taken and provide the necessary follow up along the way. We are comfortable working with other city departments including: planning, building, engineering, fire, police, finance, city attorney or the City manager's office when necessary to bring all the right people into the matter to

ensure a complete resolution is found.

Environmental Review: we prepare initial studies, negative declarations, environmental impact reports and mitigation monitoring programs. We provide peer review of other agency documents and prepare responses to comments and conduct scoping meetings with the public and stakeholder groups.

Project Management: we proactively manage our caseload to ensure that all deadlines are kept and projects stay on schedule. We coordinate with various city departments for comments and build relationships with department representatives to ensure good communication and coordination is maintained throughout the life of each project. We ensure that all files and plans are kept in your offices. We create a tracking log so that anyone in the city can identify where a case is in the process and what deadlines and next steps are necessary. We also ensure that we keep an accurate log of communications with the applicants so that we have backup if there is a question on information provided.

Customer Service: our staff sees this as their top priority. We take responsibility for each visitor to City Hall and take pleasure in ensuring that they have the information they need. Our team compiles a procedure handbook for each city we serve so that we have the ability to know special policies, processes and responses to inquiries at a glance. These handbooks are provided for each of our clients so they have them as a resource for new staff in the future as well.

Specialized Expertise: we offer a highly capable team of professionals that are specialists in grant writing, design review, housing and CDBG program administration, building plan review, engineering services, redevelopment staffing, meeting transcription, administrative support, historic preservation and architectural review.

Professional Development Training: We believe that professional development is a high priority and are always looking for opportunities to contribute to the professional growth and development of others. Our firm has taken best practices that are in use throughout the industry and have developed a series of training programs that are geared to the public sector. As an added value to the clients that we serve we offer one free training for staff and/or planning commissioners annually at no charge. We provide the handouts, curriculum, presentation materials and even participation prizes at no additional cost to our clients. We believe this is a service that we can provide to add value to the organizations that we have the privilege of serving.

We use fresh, interactive, engaging methods of training and offer hands on experience with the topics covered. Our trainings are relevant and interesting so that participants walk away prepared and with the skills they need to be successful. Some of the topics that we have developed include:

- Customer Service
- Improving Public Speaking/Presentation Skills
- Fine Tuning and Improving Report Writing
- Conflict Management and Dispute Resolution
- New Commissioner/Councilmember Training
- Ethics
- Effective Negotiating Techniques and Tools
- Goal Setting
- Creating an Effective Public Outreach
- Becoming an Outstanding Project/Case Manager
- Dealing with Difficult People

Facilitation/Public Outreach: we have provided facilitation and public outreach to many different groups throughout California and share with our clients the tools and techniques that are most effective. We enjoy working with people and we see the public as a useful resource and not a barrier to the public process. As a facilitator, we are neutral and our role is to lead the discussion, to listen to input and learn from the experts, the citizens. Our goal as the facilitator is to spend more time listening and less time talking. The Lilley Planning Group has trained and experienced professional facilitators on our team that are available to help your community with public outreach efforts of any kind. We have provided this service for small groups dealing with neighborhood issues to large visioning efforts with more than 500 participants.

We have provided recent facilitation and training services to the County of Sonoma, City of Citrus Heights, City of Fullerton, City of Ventura, City of Anaheim, County of Ventura – Harbor Commission, Pasadena Heritage, Pasadena Playhouse District Association, County of Los Angeles Bike Coalition, City of Glendale, and City of San Gabriel. The following is an overview of the services we offer as part of our public outreach efforts:

- Planning and preparing for community meetings;
- Developing materials, agenda, scripts, guidelines for participants and staff, presentation tools and time blocking of the event;
- Holding and leading team meetings to ensure that all steps have been considered and the event is well thought through and the program is thoroughly developed;
- Training other facilitators and conducting walk through and Q&A's on the agenda and the recording steps if necessary;
- Room set-up and preparation to ensure that all accommodations have been considered, that the room is conducive to the audience that is expected and that the audio and visual needs have been addressed;
- Guiding participants through interactive agendas and meeting materials;
- Leading keypad polling and respond to technical issues and other changes in real time;
- Providing problem solving and feedback to all team members including technical support, facilitators and recorders throughout the event;

- * Soliciting feedback from table participants and clarifying with them to ensure we have captured their feedback;
- * Conducting follow up evaluation meetings to review progress and make adjustments prior to next steps;
- * Preparing follow up materials and conducting debrief following the event; and
- * Preparing summary reports and recommendations.

REFERENCES

The following are some of the public agencies we have provided services for over the last year. Additional references can be provided upon request. We have maintained a solid reputation for providing outstanding service with all the clients we have served. We are proud of the relationships that we have built.

Service Information	Reference Information
<p>Service: On-Call Planning Services – Customer Service, Discretionary Case Management.</p>	<p>City of Mission Viejo Ms. Elaine Lister Planning Manager 949-470-3024 200 Civic Center Mission Viejo, CA 92691 elister@cityofmissionviejo.org</p>
<p>Service: On-Call Planning Services – Discretionary Case Management, Environmental Documentation, Project Management, Special Projects.</p>	<p>City of West Hollywood Mr. John Keho Planning Manager 323.848.6393 8300 Santa Monica Boulevard West Hollywood, CA 90069 jkeho@weho.org</p>
<p>Service: On-Call Planning Services – Discretionary Case Management, Environmental Documentation, Project Management, Special Projects.</p>	<p>City of Beverly Hills Mr. Jonathan Lait Planning Manager 310-285-1118 455 North Rexford Drive Beverly Hills, CA 90210 jlait@beverlyhills.org</p>
<p>Service: On-Call Staffing, Policy Document Preparation, Project Management, Zoning Code/General Plan Preparation, Facilitation Services – Facilitation, Recommendations.</p>	<p>City of Villa Park Mr. Jarad Hildenbrand City Manager 714.998.1500 17855 Santiago Boulevard Villa Park, CA 92861 jhildenbrand@villapark.org</p>
<p>Service: On-Call Planning Services, Project Management, CEQA, Special Projects.</p>	<p>City of Orange Ms. Alice Angus Community Development Director 714-744-7242 300 East Chapman Avenue Orange, CA 92866 aangus@cityoforange.org</p>
<p>Service: On-Call Services.</p>	<p>City of Oceanside Mr. Richard Greenbauer Senior Planner 760-435-3519 300 North Coast Highway Oceanside, CA rgreenbauer@ci.oceanside.ca.us</p>

Service Information	Reference Information
<p>Service: On-Call Services, Policy Document Preparation, Project Management, Zoning Code/General Plan Consistency Study, Facilitation Services – Strategic Planning, Recommendations</p>	<p>City of San Gabriel Mr. Steven Preston, FAICP City Manager 626.308.2806 425 Mission Avenue San Gabriel, CA 91776 Spreston@sgch.org</p>
<p>Service: On-Call Planning Services – Customer Service, Discretionary Case Management and Other Related Services.</p>	<p>City of Brea Mr. David Crabtree, AICP Deputy Development Services Director/ City Planner 714.990.7674 One Civic Center Circle Brea, CA 92821 dcrabtree@ci.brea.ca.us</p>
<p>Services: On-Call Services, Special Studies, Design Guidelines and Conformance Policies</p>	<p>City of Lake Forest – Redevelopment Agency Mr. David Belmer Assistant City Manager 949.461.3567 25550 Commercentre Drive Suite 100 Lake Forest, CA 92630 dbelmer@lakeforestca.gov</p>
<p>Services: On-Call Services.</p>	<p>City of Lake Forest – Dev. Services Department Ms. Gayle Ackerman Director 949.461.3500 25550 Commercentre Drive Suite 100 Lake Forest, CA 92630 gackerman@lakeforestca.gov</p>