

CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

Agreement Number:	Amendment Number:
2017-06-20-1103	2

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and 4Leaf "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by \$700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
"June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars (\$1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in **Exhibit A** (4LEAF, Inc.), **Exhibit B** (Bureau Veritas North America), **Exhibit C** (CSG Consultants, Inc.), and **Exhibit D** (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

4LEAF, Inc.

Contractor's Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

11/15/2019
Date

Kevin Duggan, President

Printed Name and Title of Person Signing

2126 Rheem Dr., Pleasanton, CA 94588

Address

CITY OF STOCKTON

for Chapman L. Clegg
Laurie Montes, Acting City Manager

12-24-19
Date

ATTEST:

for Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY: John M. Luebberke

2017-06-20-1103 NP
Amendment 2

RECEIVED

City Manager

Date Received

DEC 19 2019

CONTRACT ROUTING FORM

City Clerk
Date ReceivedCITY MANAGER'S OFFICE
CITY OF STOCKTONContract Number 2017-06-20-1103 NP AMENDMENT #2

(For Clerk's Use)

CITY CONTRACT TYPE (select one)

- ☐ Original ☒ Amendment/Change Order ☐ Grant
☐ Subdivision Agreement ☐ Other _____

CONTRACT INFORMATION

Contract Amount: \$ 1,700,000

Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES SAA #2
 Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
 Contract Start Date: 07/19/17 Contract End Date: 06/30/21 Contract Term: 48 Months

COUNCIL APPROVAL REQUIRED? ☒ Yes ☐ No (provide account # if no) _____Council approval required for contracts over \$ 75,000 for FISCAL YEAR: 2019/20Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104 Must be Attached ☒

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):

Business License Required? ☒ Yes ☐ No Business License No. 4Leaf-20 00078218, BV-20 00127671
 Bonds Required? ☐ Yes ☒ No CSG-20-00114727, WC3-20-00127495
 Insurance Required? ☒ Yes ☐ No
 Notary Required? ☐ Yes ☒ No Recordation Required? ☐ Yes ☒ No

Mandatory Routing Order

1 DEPARTMENT: Community Development

DEPARTMENT HEAD APPROVAL [Signature] date: 12/11/19
 Project Mgr: Heather Mompean ext: 8310 Staff: _____ ext: _____
 Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by: _____

2 PROCUREMENT

Approved (✓) Name/Signature: Marina Lemos
 Forwarded to: RISK on: 12/13/19 by: Marina Lemos

3 VENDOR/OTHER PARTY

Signed (✓) originals on: _____
 Forwarded to: _____ on: _____ by: _____

4 RISK SERVICES

Insurance on: 12-18-19 by: [Signature] Bonds approved on: _____ by: _____
 Forwarded to: CA on: 12-18-19 by: M. [Signature] RM #: 20-188

5 CITY ATTORNEY

Approved as to Form and Content on: 12/18/19 by: [Signature]
 Forwarded to: CM on: 12-19-19 by: [Signature]

6 CITY MANAGER

Signed by City Manager on: 12/24/19 Forwarded to: CC on: 12/24/19 by: [Signature]

7 CITY CLERK

City Clerk attested on: 12/26/19 Returned PDF original(s) to dept. on: 12/26/19 by: [Signature]
 Retained (4*) original(s) for City's file. Hard Copy on file? Yes ☒ No ☐ OB # _____

8 ORIGINATING DEPARTMENT:

Requisition No. _____ Original sent to vendor on: _____ by: _____
 Copy of contract to be retained by department. Original on file in the Clerk's office.
 Copy of contract sent to Purchasing on: _____ by: _____

9 PROCUREMENT: Purchase Order No. _____ PUR No. _____

*4 originals retained = each of 4 vendors

2017-06-20-1103 NP
Amendment #2

MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

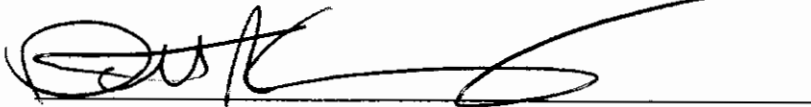
SUBJECT: **AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES**

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add \$520,000 bringing the total contract amount to \$1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional \$700,000 for a total of \$1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.



SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

Attachments:

- | | | |
|-----------------------------|----------------|--|
| A. PSA Amendment 1 | | |
| Contract 2017-06-20-1103 | NP Amendment 1 | 4Leaf - Professional Services Master Agreement |
| Contract 2017-06-20-1103-01 | NP Amendment 1 | Bureau Veritas North America Inc - Professional Services Agreement |
| Contract 2017-06-20-1103-02 | NP Amendment 1 | CSG Consultants - Professional Services Agreement |
| Contract 2017-06-20-1103-03 | NP Amendment 1 | West Coast Code Consultants WC3 - Professional Services Agreement |
| B. PSA Original | | |
| Contract 2017-06-20-1103 | NP | 4Leaf - Professional Services Master Agreement |
| Contract 2017-06-20-1103-01 | NP | Bureau Veritas North America Inc - Professional Services Agreement |
| Contract 2017-06-20-1103-02 | NP | CSG Consultants - Professional Services Agreement |
| Contract 2017-06-20-1103-03 | NP | West Coast Code Consultants WC3 - Professional Services Agreement |



City of Stockton

Legislation Text

File #: 19-5883, Version: 1

MOTION - 2019-10-29 - 1104

AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
 - a. 4LEAF, Inc. Fair Oaks, CA;
 - b. Bureau Veritas North America, Inc. Sacramento, CA;
 - c. CSG Consultants, Inc. Sacramento, CA;
 - d. West Coast Code Consultants, Inc. San Ramon, CA
2. Increase funding for individual projects by \$700,000 for a revised amount not to exceed \$1,700,000 across the entire vendor pool; and
3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of

specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed \$1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.

DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled \$480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by \$520,000; bringing the total to \$1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the \$1 million contract total (\$480,000 original contract and \$520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, \$320,000 was expended the first year and \$400,000 was expended the second year. This leaves \$280,000 remaining for FY 2019-20. At the current expenditure rate which averages \$40,000 per month, the forecasted rate of expenditure will require an additional \$700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

- FY 2014/15 - \$212 million
- FY 2015/16 - \$303 million
- FY 2016-17 - \$308 million
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Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, \$419 million and \$427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional \$700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add \$220,000 to the \$280,000 remaining in FY 2019-20, and provide a total amount of \$500,000 for FY 2019-20 and \$480,000 for FY 2020-21.

File #: 19-5883, Version: 1

As stated, \$280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the \$500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

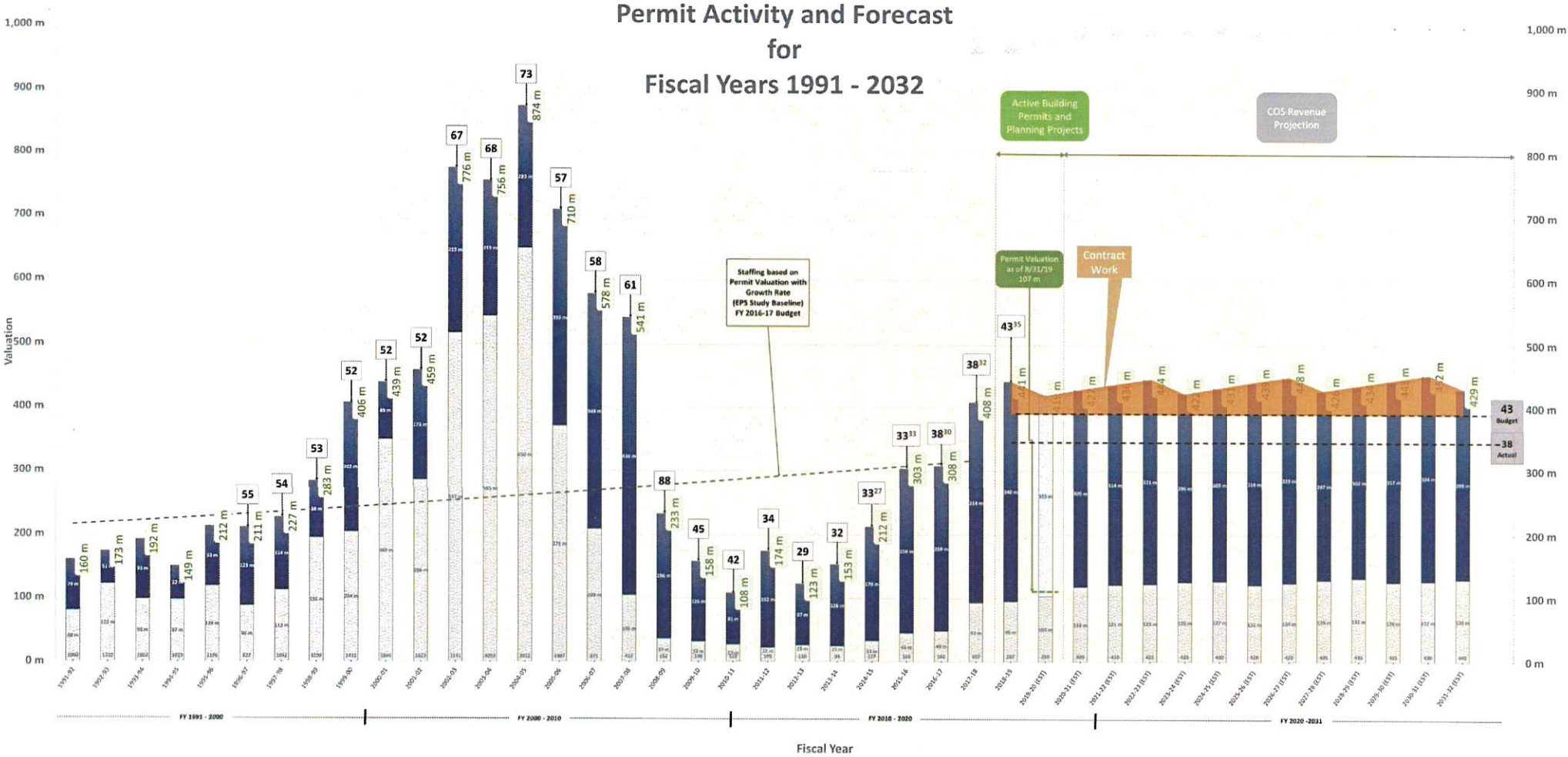
There is no financial impact on the General Fund with this financial action.

Attachment A - Master Services Agreement 2017-06-20-1103 NP

Attachment B - Master Services Agreement Amendment 1

Attachment C - Permit Activity Chart

Attachment D - Proposed Master Services Agreement Amendment 2



CHANGE ORDER CALCULATOR

Vendor:	4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc	Date:	12/05/19
Dept:	CDD	PO Number:	201263 - 201266
Project #	Master On-Call Bldg Services PUR 17-001	Account Number:	048-18-530.20-65

<p style="text-align: center;">ENTRIES IN BOLD RED INDICATE YOUR BALANCE OF CM AUTHORITY CCO AMOUNT IS EXCEEDED. YOU MUST GO TO COUNCIL FOR APPROVAL.</p> <p style="text-align: center;">(Effective 2/26/15: CM Authority = \$75,000)</p>	Original Contract Amount:	\$480,000.00
	Original Contract Award Date:	07/19/17
	Original Contract Expiration Date:	06/30/20
	Contract Amount to date:	\$1,700,000.00
	Authorized CCO Amount to date:	\$1,220,000.00
	Available CCO Funding:	
	Contract Expiration to date:	06/30/21

CCO No.	Description	Requested CCO Amount	Time Extensions			Required Approval by:		Date CC Approved (mm/dd/yy)	Revised Contract Amount	Revised CCO Authority Balance
			D	M	WD	CM	CC			
PREVIOUSLY APPROVED CCOs										
	Last Council Action	\$520,000.00					Y	06/27/18	\$1,000,000.00	\$165,000.00
	Total approved CCOs since last Council Action	\$0.00				Y				
NEW PROPOSED CCOs										
2	Increase Funding	\$700,000.00					Y	10/29/19	\$1,000,000.00	\$165,000.00
2	Contract extended 6/30/21			12				10/29/19	\$1,700,000.00	\$235,000.00

PREVIOUSLY APPROVED CCO LIST

Vendor:	4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc		Date:	12/05/19
Dept:	CDD		PO Number:	201263 - 201266
Project #	Master On-Call Bldg Services PUR 17-001		Account Number:	048-18-530.20-65

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	Original Contract Award Date:	07/19/17
	Original Contract Expiration Date:	06/30/20

[illegible]

CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

Agreement Number:	Amendment Number:
2017-06-20-1103-01	2

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and Bureau Veritas North America, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

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3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

Bureau Veritas North America

Contractor's Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

November 15, 2019

Date

Craig Baptista, Director of Operations

Printed Name and Title of Person Signing

180 Promenade Circle, ste. 150 Sacramento, CA 95834

Address

CITY OF STOCKTON

for *Christine L. Montes*
Laurie Montes, Acting City Manager

12-24-19
Date

ATTEST:

for *Eliza R. Garza*
Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY: *John M. Luebberke*



RECEIVED

City Manager

Date Received

DEC 19 2019

CONTRACT ROUTING FORM

City Clerk
Date ReceivedCITY MANAGER'S OFFICE
CITY OF STOCKTONContract Number 2017-06-20-1103 NP AMENDMENT #2

(For Clerk's Use)

CITY CONTRACT TYPE (select one)

- ☐ Original ☒ Amendment/Change Order ☐ Grant
☐ Subdivision Agreement ☐ Other _____

CONTRACT INFORMATION

Contract Amount: \$ 1,700,000Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES SAA #2Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code ConsultantsContract Start Date: 07/19/17 Contract End Date: 06/30/21 Contract Term: 48 MonthsCOUNCIL APPROVAL REQUIRED? ☒ Yes ☐ No (provide account # if no) _____Council approval required for contracts over \$ 75,000 for FISCAL YEAR: 2019/20Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104 Must be Attached ☒

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):

Business License Required? ☒ Yes ☐ No Business License No. 4Leaf-20 00078218, BV-20 00127671Bonds Required? ☐ Yes ☒ No CSG-20-00114727, WC3-20-00127495Insurance Required? ☒ Yes ☐ NoNotary Required? ☐ Yes ☒ No Recordation Required? ☐ Yes ☒ No

Mandatory Routing Order

1 DEPARTMENT: Community DevelopmentDEPARTMENT HEAD APPROVAL [Signature] date: 12/11/19Project Mgr: Heather Mompean ext: 8310 Staff: _____ ext: _____Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by: _____

2 PROCUREMENT

Approved (✓) Name/Signature: Marina Lemos [Signature]Forwarded to: RISK on: 12/13/19 by: Marina Lemos

3 VENDOR/OTHER PARTY

Signed (✓) originals on: _____

Forwarded to: _____ on: _____ by: _____

4 RISK SERVICES

Insurance on: 12-18-19 by: [Signature] Bonds approved on: _____ by: _____Forwarded to: CA on: 12-18-19 by: M. [Signature] RM #: 20-188

5 CITY ATTORNEY

Approved as to Form and Content on: 12/18/19 by: [Signature]Forwarded to: CM on: 12-19-19 by: [Signature]

6 CITY MANAGER

Signed by City Manager on: 12/24/19 Forwarded to: CC on: 12/24/19 by: [Signature]

7 CITY CLERK

City Clerk attested on: 12/26/19 Returned PDF original(s) to dept. on: 12/26/19 by: [Signature]Retained (4*) Original(s) for City's file. Hard Copy on file? Yes ☒ No ☐ OB # _____

8 ORIGINATING DEPARTMENT:

Requisition No. _____ Original sent to vendor on: _____ by: _____

Copy of contract to be retained by department. Original on file in the Clerk's office.

Copy of contract sent to Purchasing on: _____ by: _____

9 PROCUREMENT: Purchase Order No. _____ PUR No. _____

*4 originals retained = each of 4 vendors

2017-06-20-1103 NP
Amendment 2

MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: **AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES**

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SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

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- | | | |
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City of Stockton

Legislation Text

File #: 19-5883, Version: 1

MOTION - 2019-10-29 - 1104

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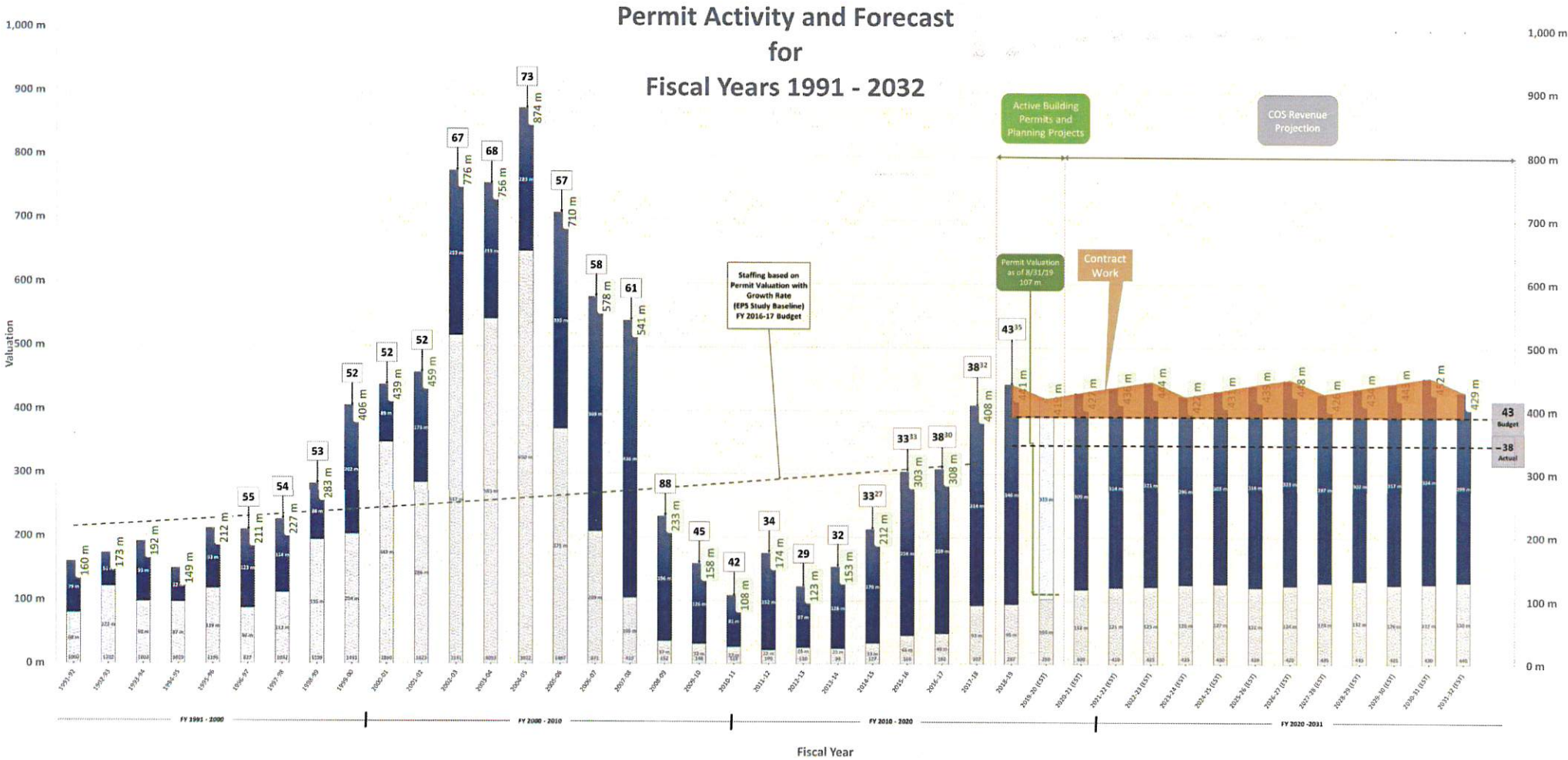
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Attachment A - Master Services Agreement 2017-06-20-1103 NP

Attachment B - Master Services Agreement Amendment 1

Attachment C - Permit Activity Chart

Attachment D - Proposed Master Services Agreement Amendment 2



CHANGE ORDER CALCULATOR

Vendor:	4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc	Date:	12/05/19
Dept:	CDD	PO Number:	201263 - 201266
Project #	Master On-Call Bldg Services PUR 17-001	Account Number:	048-18-530.20-65

**ENTRIES IN BOLD RED INDICATE
YOUR BALANCE OF CM AUTHORITY CCO AMOUNT IS EXCEEDED.
YOU MUST GO TO COUNCIL FOR APPROVAL.**
(Effective 2/26/15: CM Authority = \$75,000)

Original Contract Amount:	\$480,000.00
Original Contract Award Date:	07/19/17
Original Contract Expiration Date:	06/30/20
Contract Amount to date:	\$1,700,000.00
Authorized CCO Amount to date:	\$1,220,000.00
Available CCO Funding:	
Contract Expiration to date:	06/30/21

CCO No.	Description	Requested CCO Amount	Time Extensions			Required Approval by:		Date CC Approved (mm/dd/yy)	Revised Contract Amount	Revised CCO Authority Balance
			D	M	WD	CM	CC			
PREVIOUSLY APPROVED CCOs										
	Last Council Action	\$520,000.00					Y	06/27/18	\$1,000,000.00	\$165,000.00
	Total approved CCOs since last Council Action	\$0.00				Y				
NEW PROPOSED CCOs										
									\$1,000,000.00	\$165,000.00
2	Increase Funding	\$700,000.00					Y	10/29/19	\$1,700,000.00	\$235,000.00
2	Contract extended 6/30/21			12				10/29/19		
						</				

[illegible]

CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

Agreement Number:	Amendment Number:
2017-06-20-1103	2

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and CSG Consultants, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by \$700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
"June 30, 2021"

2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars (\$1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in **Exhibit A** (4LEAF, Inc.), **Exhibit B** (Bureau Veritas North America), **Exhibit C** (CSG Consultants, Inc.), and **Exhibit D** (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

CSG Consultants, Inc., a California corporation

Contractor's Name (if other than an individual, state whether a corporation, partnership, etc.):

Authorized Signature

Date

Cyrus Kiangour, President

Printed Name and Title of Person Signing

550 Pilgrim Drive, Foster City, CA 94404

Address

CITY OF STOCKTON

for *Chyler L. Cleary*
Laurie Montes, Acting City Manager

Date

ATTEST:

for *Eliza R. Garza*
Eliza R. Garza CMC, City Clerk

APPROVED AS TO FORM:

John M. Luebberke, City Attorney

BY: *John M. Luebberke*



2017-06-20-1103-02 NP
Amendment 2

RECEIVED

City Manager

Date Received

DEC 19 2019

CONTRACT ROUTING FORM

City Clerk

Date Received

CITY MANAGER'S OFFICE

CITY OF STOCKTON

Contract Number 2017-06-20-1103 NP AMENDMENT #2

(For Clerk's Use)

CITY CONTRACT TYPE (select one)

- ☐ Original ☒ Amendment/Change Order ☐ Grant
☐ Subdivision Agreement ☐ Other _____

CONTRACT INFORMATION

Contract Amount: \$ 1,700,000Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES SAA #2Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code ConsultantsContract Start Date: 07/19/17 Contract End Date: 06/30/21 Contract Term: 48 MonthsCOUNCIL APPROVAL REQUIRED? ☒ Yes ☐ No (provide account # if no)Council approval required for contracts over \$ 75,000 for FISCAL YEAR: 2019/20Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104 Must be Attached ☒

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):

Business License Required? ☒ Yes ☐ No Business License No. 4Leaf-20 00078218, BV-20 00127671Bonds Required? ☐ Yes ☒ No CSG-20-00114727, WC3-20-00127495Insurance Required? ☒ Yes ☐ NoNotary Required? ☐ Yes ☒ No Recordation Required? ☐ Yes ☒ No

Mandatory Routing Order

1 DEPARTMENT: Community DevelopmentDEPARTMENT HEAD APPROVAL Quemmy date: 12/11/19Project Mgr: Heather Mompean ext: 8310 Staff: _____ ext: _____Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by: _____

2 PROCUREMENT

Approved (✓) Name/Signature: Marina Lemos MFSForwarded to: RISK on: 12/13/19 by: Marina Lemos

3 VENDOR/OTHER PARTY

Signed (✓) originals on: _____

Forwarded to: _____ on: _____ by: _____

4 RISK SERVICES

Insurance on: 12-18-19 by: mo Bonds approved on: _____ by: _____Forwarded to: CA on: 12-18-19 by: as. my RM #: 20-188

5 CITY ATTORNEY

Approved as to Form and Content on: 12/18/19 by: YHForwarded to: CM on: 12-19-19 by: X Hart

6 CITY MANAGER

Signed by City Manager on: 12/24/19 Forwarded to: CC on: 12/24/19 by: myler

7 CITY CLERK

City Clerk attested on: 12/26/19 Returned PDF original(s) to dept. on: 12/26/19 by: WHLRetained (4*) original(s) for City's file. Hard Copy on file? Yes ☒ No ☐ OB # _____

8 ORIGINATING DEPARTMENT:

Requisition No. _____ Original sent to vendor on: _____ by: _____

Copy of contract to be retained by department. Original on file in the Clerk's office.

Copy of contract sent to Purchasing on: _____ by: _____

9 PROCUREMENT: Purchase Order No. _____

PUR No. _____

*4 originals retained = each of 4 vendors

2017-06-20-1103 NP
Amendment #2

MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

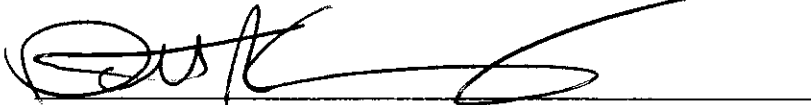
SUBJECT: **AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES**

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add \$520,000 bringing the total contract amount to \$1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional \$700,000 for a total of \$1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.



SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

Attachments:

- | | |
|--|--|
| A. PSA Amendment 1 | |
| Contract 2017-06-20-1103 NP Amendment 1 | 4Leaf - Professional Services Master Agreement |
| Contract 2017-06-20-1103-01 NP Amendment 1 | Bureau Veritas North America Inc - Professional Services Agreement |
| Contract 2017-06-20-1103-02 NP Amendment 1 | CSG Consultants - Professional Services Agreement |
| Contract 2017-06-20-1103-03 NP Amendment 1 | West Coast Code Consultants WC3 - Professional Services Agreement |
| B. PSA Original | |
| Contract 2017-06-20-1103 NP | 4Leaf - Professional Services Master Agreement |
| Contract 2017-06-20-1103-01 NP | Bureau Veritas North America Inc - Professional Services Agreement |
| Contract 2017-06-20-1103-02 NP | CSG Consultants - Professional Services Agreement |
| Contract 2017-06-20-1103-03 NP | West Coast Code Consultants WC3 - Professional Services Agreement |



City of Stockton

Legislation Text

File #: 19-5883, Version: 1

MOTION-2019-10-29-1104

AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
 - a. 4LEAF, Inc. Fair Oaks, CA;
 - b. Bureau Veritas North America, Inc. Sacramento, CA;
 - c. CSG Consultants, Inc. Sacramento, CA;
 - d. West Coast Code Consultants, Inc. San Ramon, CA
2. Increase funding for individual projects by \$700,000 for a revised amount not to exceed \$1,700,000 across the entire vendor pool; and
3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of

specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed \$1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.

DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled \$480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by \$520,000; bringing the total to \$1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the \$1 million contract total (\$480,000 original contract and \$520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, \$320,000 was expended the first year and \$400,000 was expended the second year. This leaves \$280,000 remaining for FY 2019-20. At the current expenditure rate which averages \$40,000 per month, the forecasted rate of expenditure will require an additional \$700,000 over the course of the next fiscal year (FY 2020-21).

Stockton development valuation increased over the past five fiscal years as shown below:

- FY 2014/15 - \$212 million
- FY 2015/16 - \$303 million
- FY 2016-17 - \$308 million
- FY 2017-18 - \$408 million
- FY 2018-19 - \$441 million

Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, \$419 million and \$427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional \$700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add \$220,000 to the \$280,000 remaining in FY 2019-20, and provide a total amount of \$500,000 for FY 2019-20 and \$480,000 for FY 2020-21.

File #: 19-5883, Version: 1

As stated, \$280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the \$500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

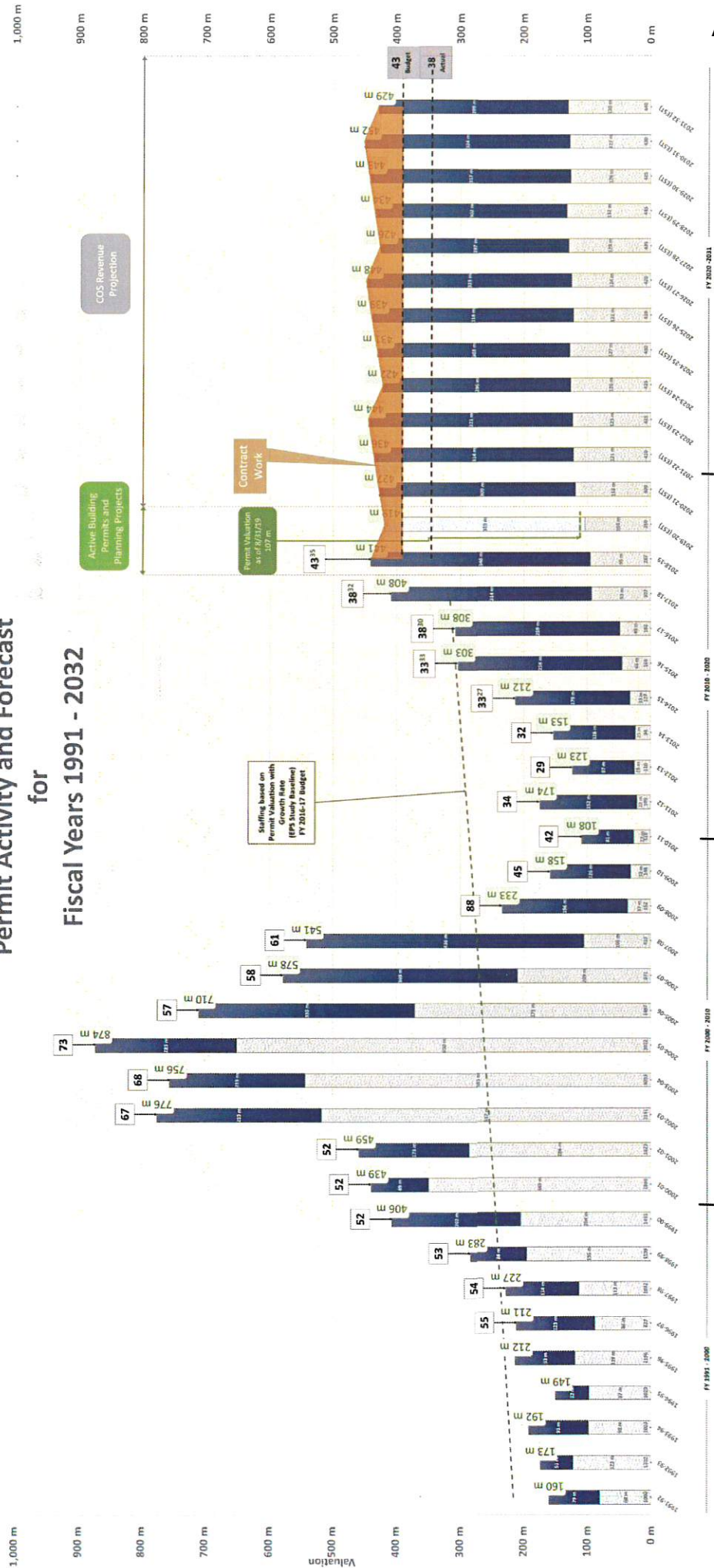
Attachment A - Master Services Agreement 2017-06-20-1103 NP

Attachment B - Master Services Agreement Amendment 1

Attachment C - Permit Activity Chart

Attachment D - Proposed Master Services Agreement Amendment 2

Permit Activity and Forecast for Fiscal Years 1991 - 2032



[illegible]

Vendor:	4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc	Date:	12/05/19
Dept:	CDD	PO Number:	201263 - 201266
Project #	Master On-Call Bldg Services PUR 17-001	Account Number:	048-18-530-20-65

[illegible]

CITY OF STOCKTON
STANDARD AGREEMENT AMENDMENT

Agreement Number:	Amendment Number:
2017-06-20-1103	2

This Amendment Number 2 to the above referenced Agreement is entered into July 19, 2017 between the City of Stockton ("City") and West Coast Code Consultants, Inc. "Contractor".

RECITALS

Section 7 Changes states any changes and related fees shall be mutually agreed upon between the parties and subject to written amendment to this Agreement; and

Section 3 Term states both parties may extend this Agreement up to two one-year extensions; and

The City needs to increase the Compensation, Not to Exceed amount in Section 4 of the Professional Services Agreement by \$700,000 to pay for the Contractor services to effectively provide optimum service due to increased workload; and

Now therefore, the City and the Contractor mutually agree as follows:

1. The termination date in Section 3 of the Professional Services Agreement is amended to:
"June 30, 2021"
2. The maximum not to exceed amount to be paid to the Contractor, including if authorized, reimbursement of expenses, in Section 4 of the Professional Services Agreement will now read as follows:

Compensation. Compensation for services and reimbursable expenses is hereby amended to be in the amount not to exceed One Million Seven Hundred Thousand Dollars (\$1,700,000), and not to exceed hourly rates as described more particularly under Professional Services Fees found in **Exhibit A** (4LEAF, Inc.), **Exhibit B** (Bureau Veritas North America), **Exhibit C** (CSG Consultants, Inc.), and **Exhibit D** (West Coast Code Consultants, Inc.). The payments shall be made on a monthly basis upon receipt and approval of Consultant's invoice. Consultant acknowledges that this amount includes total compensation across four contracts.

3. All other terms and conditions of the Agreement shall remain unchanged and remain in full force and effect unless modified by a written amendment signed by both parties.

IN WITNESS WHEREOF, the authorized parties have executed this Agreement.

CONTRACTOR

West Coast Code Consultants, Inc.
Contractor's Name (if other than an individual, state whether a corporation, partnership, etc.):
[Signature] 11/18/19
Authorized Signature Date
Giyan Senaratne Principal / CEO
Printed Name and Title of Person Signing
2400 Camino Ramon, Suite 240, San Ramon, CA 94583
Address

CITY OF STOCKTON

for Christine T. Cleary 12-24-19
Laurie Montes, Acting City Manager Date
ATTEST:
[Signature]
Eliza R. Garza CMC, City Clerk
APPROVED AS TO FORM:
John M. Luebbeke, City Attorney
BY: [Signature]



2017-06-20-1103-03 NP
Amendment 2

RECEIVED

City Manager

Date Received

DEC 19 2019

CONTRACT ROUTING FORM

City Clerk
Date ReceivedCITY MANAGER'S OFFICE
CITY OF STOCKTONContract Number 2017-06-20-1103 NP AMENDMENT #2

(For Clerk's Use)

CITY CONTRACT TYPE (select one)

- ☐ Original ☒ Amendment/Change Order ☐ Grant
☐ Subdivision Agreement ☐ Other _____

CONTRACT INFORMATION

Contract Amount: \$ 1,700,000

Contract Title: PROFESSIONAL SERVICES AGREEMENT FOR BUILDING ON-CALL SERVICES SAA #2
 Vendor/Other Party: 4Leaf, Bureau Veritas North America Inc., CSG Consultants & West Coast Code Consultants
 Contract Start Date: 07/19/17 Contract End Date: 06/30/21 Contract Term: 48 Months

COUNCIL APPROVAL REQUIRED? ☒ Yes ☐ No (provide account # if no) _____Council approval required for contracts over \$ 75,000 for FISCAL YEAR: 2019/20Motion/Resolution/Ordinance No: 2017-06-20-1103, 2019-10-29-1104 Must be Attached ☒

REQUIRED DOCUMENTS (The following documents shall be submitted with the signed contract when required):

Business License Required? ☒ Yes ☐ No Business License No. 4Leaf-20 00078218, BV-20 00127671
 Bonds Required? ☐ Yes ☒ No CSG-20-00114727, WC3-20-00127495
 Insurance Required? ☒ Yes ☐ No
 Notary Required? ☐ Yes ☒ No Recordation Required? ☐ Yes ☒ No

Mandatory Routing Order

1 DEPARTMENT: Community Development

DEPARTMENT HEAD APPROVAL [Signature] date: 12/11/19
 Project Mgr: Heather Mompean ext: 8310 Staff: _____ ext: _____
 Forwarded to: Marina Lemos (Procurement) on: 12/11/19 by: _____

2 PROCUREMENT

Approved (✓) Name/Signature: Marina Lemos
 Forwarded to: RISK on: 12/13/19 by: Marina Lemos

3 VENDOR/OTHER PARTY

Signed (✓) originals on: _____
 Forwarded to: _____ on: _____ by: _____

4 RISK SERVICES

Insurance on: 12-18-19 by: [Signature] Bonds approved on: _____ by: _____
 Forwarded to: CA on: 12-18-19 by: M. [Signature] RM #: 20-188

5 CITY ATTORNEY

Approved as to Form and Content on: 12/18/19 by: [Signature]
 Forwarded to: CM on: 12-19-19 by: [Signature]

6 CITY MANAGER

Signed by City Manager on: 12/24/19 Forwarded to: CC on: 12/24/19 by: [Signature]

7 CITY CLERK

City Clerk attested on: 12/26/19 Returned PDF original(s) to dept. on: 12/26/19 by: [Signature]
 Retained (4*) Original(s) for City's file. Hard Copy on file? Yes ☒ No ☐ OB # _____

8 ORIGINATING DEPARTMENT:

Requisition No. _____ Original sent to vendor on: _____ by: _____
 Copy of contract to be retained by department. Original on file in the Clerk's office.
 Copy of contract sent to Purchasing on: _____ by: _____

9 PROCUREMENT: Purchase Order No. _____ PUR No. _____

*4 originals retained = each of 4 vendors

2017-06-20-1103 NP
Amendment 2

MEMORANDUM

November 26, 2019

TO: Laurie Montes, Interim City Manager

FROM: Scott Carney, Acting Director

SUBJECT: **AMENDMENT #2 TO THE PROFESSIONAL SERVICES MASTER AGREEMENT FOR ON-CALL BUILDING SERVICES**

On June 20, 2017, the City Council approved entering into a Professional Services Master Agreement for on-call building plan review and inspection, engineering plan review, and floodplain management services (Attachments A to D – Professional Master Services Agreement 2017-06-20-1103-NP). Additionally, an amendment to the original contract was approved by the City Council on June 27, 2018 to add \$520,000 bringing the total contract amount to \$1,000,000 (Attachments E to H – Amendment to The Professional Services Master Agreement for On-Call Building Services 2017-06-20-1103-NP).

On October 29, 2019, the City Council approved (Motion 2019-10-29-1104) a second amendment to the Professional Services Master Agreement for on-call building services.

For your review and approval today is Standard Agreement Amendment No. 2 for a 1-year time extension and an additional \$700,000 for a total of \$1,700,000 to support these vital services at current rates being experienced due to the unforeseen economic growth within our community for the remainder of the contract.

All other terms and conditions of the original Professional Services Contract for On-Call Building Services shall remain unchanged and in full force and effect.



SCOTT CARNEY, ACTING DIRECTOR
COMMUNITY DEVELOPMENT DEPARTMENT

12/11/19
DATE

SC:hm

Attachments:

A. PSA Amendment 1

Contract 2017-06-20-1103	NP Amendment 1	4Leaf - Professional Services Master Agreement
Contract 2017-06-20-1103-01	NP Amendment 1	Bureau Veritas North America Inc - Professional Services Agreement
Contract 2017-06-20-1103-02	NP Amendment 1	CSG Consultants - Professional Services Agreement
Contract 2017-06-20-1103-03	NP Amendment 1	West Coast Code Consultants WC3 - Professional Services Agreement

B. PSA Original

Contract 2017-06-20-1103	NP	4Leaf - Professional Services Master Agreement
Contract 2017-06-20-1103-01	NP	Bureau Veritas North America Inc - Professional Services Agreement
Contract 2017-06-20-1103-02	NP	CSG Consultants - Professional Services Agreement
Contract 2017-06-20-1103-03	NP	West Coast Code Consultants WC3 - Professional Services Agreement



City of Stockton

Legislation Text

File #: 19-5883, Version: 1

MOTION - 2019-10-29-1104

AUTHORIZE AN AMENDMENT TO THE MASTER ON-CALL BUILDING PROFESSIONAL SERVICES AGREEMENT

RECOMMENDATION

It is recommended that the City Council approve a motion to authorize the City Manager to:

1. Execute a Professional Services Master Agreement amendment with the following professional firms for on-call contract support for Building Plan Review and Inspection, Engineering Plan Review, and Floodplain Management Services:
 - a. 4LEAF, Inc. Fair Oaks, CA;
 - b. Bureau Veritas North America, Inc. Sacramento, CA;
 - c. CSG Consultants, Inc. Sacramento, CA;
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2. Increase funding for individual projects by \$700,000 for a revised amount not to exceed \$1,700,000 across the entire vendor pool; and
3. Extend the duration of the contract for 1 year across the entire vendor pool.

It is recommended that Council authorize the City Manager to take all necessary and appropriate actions to carry out the purpose and intent of the motion.

Summary

There is a continued need to maintain an on-call list of building inspectors, plan examiners, and engineers to meet the demand for service during peak periods. Development is cyclical, and during an improving economy, the demand for building plan review and inspection services can outpace staffing levels. The past 3 fiscal years show an upward trend (average of approximately 15% increase year over year) in permit activity. The current fiscal year to date surpassed projections.

The Community Development Department (CDD) regularly completes multi-year forecasts to estimate staffing levels. The availability of multiple professional firms provides flexible resources to meet peak service demand as well as the provision of

specialized staff for unique or very complicated projects. The CDD regularly reviews workload balances the use of consultants with permanent full-time staff. Staff recommends Council approve a motion to authorize the City Manager to execute an amendment to the Professional Services Master Agreement with the four professional firms as detailed above for a total amount not to exceed \$1,700,000 and extend agreement by one year with an expiration date of June 30, 2021.

File #: 19-5883, Version: 1

DISCUSSION

Background

City Council approved a three-year Professional Services Master Agreement on June 20, 2017 (Attachment A), with four (4) companies to provide on-call building plan review and inspection, engineering plan review, and floodplain management services. The approved compensation for services and reimbursable expenses totaled \$480,000 across all consulting companies.

The agreement structure is an integral part of providing high-level services to the public. On-call building services support is used to mitigate the work created by the influx of development activity when permanent City staff reaches near capacity and needs additional resources to provide necessary service to the public at existing levels of service. Previously, as a result of increased workload, a contract amendment was approved by Council on June 27, 2018 (Attachment B) to increase the amount of the contract by \$520,000; bringing the total to \$1,000,000 as additional resources were needed to provide the level of service that the public expects.

Current Situation

Of the \$1 million contract total (\$480,000 original contract and \$520,000 for Amendment #1) for FY 2017-18 through FY 2019-20, \$320,000 was expended the first year and \$400,000 was expended the second year. This leaves \$280,000 remaining for FY 2019-20. At the current expenditure rate which averages \$40,000 per month, the forecasted rate of expenditure will require an additional \$700,000 over the course of the next fiscal year (FY 2020-21).

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Projections are based on permit activity trends and known projects. The estimates for FY 2019-20 and FY 2020-21 assume an economic slowdown and corresponding reduction in building valuations, \$419 million and \$427 million respectively (Attachment C - Permit Activity and Forecast). These estimates are consistent with the Long-Range Financial Plan. Actual permit activity for the first two months of FY 2019-20 surpassed estimates.

Based on the updated projections, there is a need for an additional \$700,000 and a 1-year contract extension (see proposed Amendment - Attachment D) to provide adequate service levels for the next two years. The CDD will not expend the excess funds and will be in a position supplement staff with contracted resources to meet demand. The contract amendment will add \$220,000 to the \$280,000 remaining in FY 2019-20, and provide a total amount of \$500,000 for FY 2019-20 and \$480,000 for FY 2020-21.

File #: 19-5883, Version: 1

As stated, \$280,000 is currently available for this fiscal year (FY 2019-20) which coincides with the existing contract expiration of June 30, 2020. Staff anticipates that these funds will not be sufficient for the duration of the contract and propose a proactive approach in anticipation for a need to 1) increase appropriations and 2) extend the contract through FY 2020-21.

FINANCIAL SUMMARY

There is sufficient budget in account 048-1830-510 for the \$500,000 cost of the amendment in FY 2019-20. For subsequent years, budget will be appropriated as part of the annual budget development process.

There is no financial impact on the General Fund with this financial action.

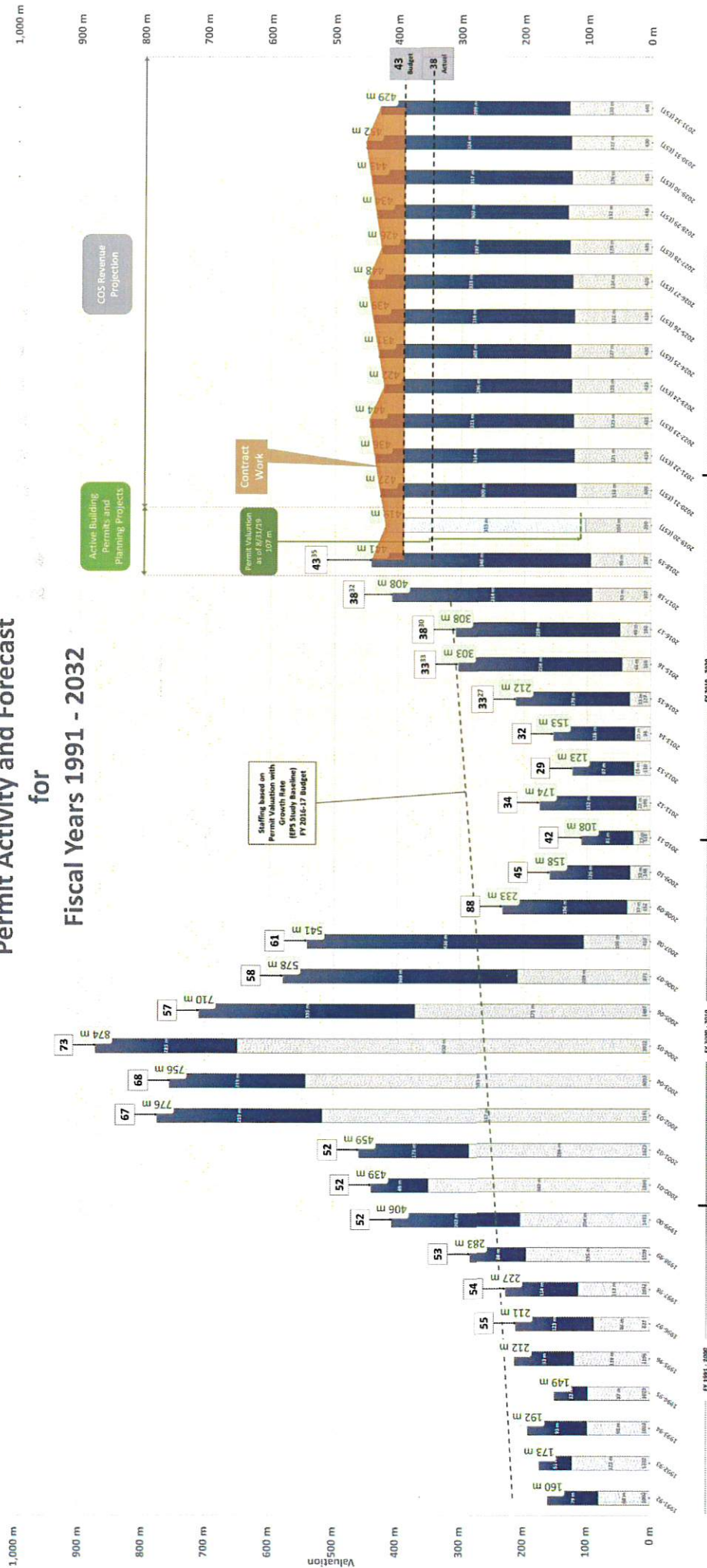
Attachment A - Master Services Agreement 2017-06-20-1103 NP

Attachment B - Master Services Agreement Amendment 1

Attachment C - Permit Activity Chart

Attachment D - Proposed Master Services Agreement Amendment 2

Permit Activity and Forecast for Fiscal Years 1991 - 2032



Vendor:	4 Leaf, Bureau Veritas North America Inc, SCG Consultants Inc, West Coast Code Inc	Date:	12/05/19
Dept:	CDD	PO Number:	201263 - 201266
Project #	Master On-Call Bldg Services PUR 17-001	Account Number:	048-18-530 20-65

Original Contract Amount:	\$480,000.00
Original Contract Award Date:	07/19/17
Original Contract Expiration Date:	06/30/20
Contract Amount to date:	\$1,700,000.00
Authorized CCO Amount to date:	\$1,220,000.00
Available CCO Funding:	
Contract Expiration to date:	06/30/21

[illegible]

[illegible]