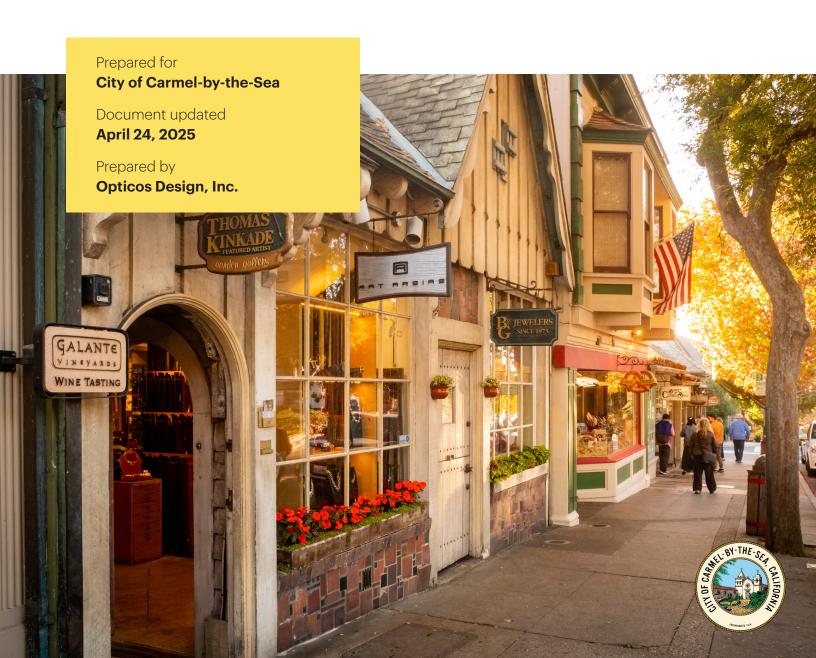




Objective Design and Development Standards Proposal

CITY OF CARMEL-BY-THE-SEA



Prepared For:



City of Carmel-by-the-Sea

Community Planning & Development Department Monte Verde 4 SE Ocean Avenue PO Box CC Carmel-by-the-Sea, CA 93921 www.ci.carmel.ca.us

ATTN: Marnie Waffle, AICP, Principal Planner 831.620.2057 housing@ci.carmel.ca.us

Prepared By:

Opticos Design, Inc.

2100 Milvia Street, Suite 125 Berkeley, California 94704 510.558.6957 We are urban designers and architects who believe in the transformative power of beautiful, sustainable, walkable communities for all.



Corporation

In 2007, Opticos became a founding B Corporation, establishing triple bottom line of social, economic, and environmental responsibility.

Contents

Cover Letter Certification Forms Review of Scope Experience + Expertise Qualifications Timeline Samples **Disclosure of Litigation** References **Insurance Coverage Fee Schedule Appendix**

Cover Letter

March 24, 2025

City of Carmel-by-the-Sea

Marnie Waffle, AICP, Principal Planner Community Planning and Building Department housing@ci.carmel.ca.us

Re: RFP for Objective Design and Development Standards for Qualifying Accessory Dwelling Units, Multi-Family Residential, and Mixed-Use Residential Projects

Dear Marnie and Selection Committee.

We are excited to submit our proposal for professional services to prepare objective design and development standards (ODDS) for Carmel-by-the-Sea!

We understand that Carmel wants ODDS that honor the architectural history and diversity of the village and generate buildings that respect the scale and character of the village through high-quality building design, architectural style, context-sensitive massing, and sensitive height transitions. We have extensive experience with these topics in preparing ODDS for over two dozen communities. The breadth of our experience provides a wide variety of approaches and solutions from which to start working with you on your ODDS to make each new building complement Carmel's unique physical character and appeal.

Opticos is a nationally recognized urban design, planning, and architecture firm passionate about creating vibrant, healthy, and sustainable places. For over 25 years, we have prepared downtown plans, revitalization strategies, form-based codes (FBC), including ODDS for 23 California communities seeking compliance with new pro-housing State Laws, and provided strategic advice for communities nationwide. We maintain a consistent and highly respected track record with private and public clients who come to us for quality design responsive to local context and public processes that is inclusive and effective in navigating complex local issues. We work together with the public, the development community, and planning staff to arrive at solutions and standards to deliver high-quality design and more housing choices.

As leaders in advocating for and creating walkable places, we specialize in implementing walkable development through form-based standards and, more recently, ODDS. We are also national leaders in advocating, writing design standards, and designing for Missing Middle Housing, which can help Carmel address small multi-family housing that is in scale with existing houses.

As a California-certified Small Business, we bring a high level of principal involvement and care to every project. As a B Corporation, our work reflects our commitment to a triple bottom line of social, economic, and environmental sustainability.

Our proposal articulates our approach to working closely with you and the community to deliver your ODDS. Key highlights of our experience and methodology include:

Opticos was hired specifically because of their expertise in community engagement and form-based code to draft a Specific Plan for the Vallco area. Their comprehensive and thoughtful engagement strategy and ability to communicate alternatives through design and visualization, were invaluable to winning support. It was an unprecedented process, and it was a real pleasure to work with the Opticos team."

Aarti Shrivastava

Assistant City Manager/ Director of Community Development, City of Cupertino, CA

■ Experience with ODDS

Our ODDS work leverages our FBC experience in creating clear and effective codes that enable streamlined permitting and review. Our ODDS work includes extensive documentation and standardization of multiple local architectural styles as well as other style-neutral best-practice strategies for design standards developed for individual communities as well as regionally applicable toolkits for Marin County and its towns; all this work readies our team for your ODDS.

■ Experience with Missing Middle Housing Implementation

We understand this scale of housing extremely well, especially through Daniel Parolek's research and book "Missing Middle Housing." We have helped communities implement Missing Middle Housing, the one- to two-story spectrum of housing choices between single-family housing and three to four-story multi-family or mixed-use development. We have done this in a wide range of ways:

- ABAG Handbook of Objective Design Standards
- ODDS for California jurisdictions, including Santa Barbara, Corte Madera, San Anselmo, Belvedere, Marin County, and Santa Rosa
- ODDS for the 82 towns and cities in the Puget Sound region of Washington state.
- Team of Experts in Coding and Architecture

We are experts at writing design and development standards because we understand sites, buildings, and their individual design elements in detail. A key feature of our approach is our Microscale Documentation, which documents Carmel's "DNA" for desired outcomes and turns that information into ODDS that generate new buildings to complement Carmel's unique physical character and appeal.

Every project we take on is a priority for us, so staff can feel comfortable knowing we are committed to delivering the best process and products possible. Our team includes the key members with the technical expertise and experience essential to the success of this project: several who have experience working as public-sector planners or private-sector architects, giving them perspective on how these regulations are used and applied daily.

Per the requirements of the RFP, we state that we have reviewed and accept the City's contract template, with the qualification that we reserve the right to negotiate the terms of that agreement depending on the final scope of services. We. We are excited and ready to work with you.

Best regards,

Tony Perez

Senior Associate, Code Reform Team Leader 805.377.1209 | tony.perez@opticosdesign.com

Drew Finke

Senior Associate, Urban Design Team Leader 510.809.9518 | drew.finke@opticosdesign.com

Certification Forms



ATTACHMENT 1 - CONFLICT OF INTEREST STATEMENT

OBJECTIVE DESIGN AND DEVELOPMENT STANDARDS CONSULTANT SERVICES
THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

The undersigned declares:
I/We Opticos Design, Inc. (Insert Name) have the following financial, business, or other relationship with the City of Carmel-by-the-Sea that may have an impact upon the outcome of the contract. If none, please specify that no other relationships may have an impact on this contract or Project. No relationships may have an impact on this contract or Project.
I/We Opticos Design, Inc. (Insert Name) have the following current clients who may have a financial interest in the outcome of this contract. If none, please specify that no other clients may have a financial interest with an impact on this contract or Project. No other clients may have a financial interest with an impact on this contract or Project.

Pursuant to Government Code section 1090 and any other laws, rules and regulations that may apply, the Consultant covenants that neither it, its subcontractors nor employees presently have an interest, and shall not acquire any interest, direct or indirect, financial or otherwise that would conflict in any manner or degree with contract awarded from this RFP. Consultant certifies that to the best of its knowledge, no one who has or will have any financial interest in the contract awarded from this RFP is an officer or employee of the City. Through its submittal of a proposal, Consultant acknowledges that it is familiar with Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California and will immediately notify the City if it becomes aware of any facts concerning the contract to be awarded that constitute a violation of said provisions.

Furthermore, if there is reason to believe that collusion exists among the Consultants, the City may refuse to consider proposals from participants in such collusion. No person, firm, or corporation under the same or different name, shall make, file, or be interested in more than one proposal for the same work unless alternate proposals are called for. A person, firm, or corporation who has submitted a subproposal to a Consultant, or who has quoted prices on materials to a Consultant, is not thereby

disqualified from submitting a sub-proposal or quoting prices to other Consultants. Reasonable ground for believing that any Consultant is interested in more than one proposal for the same work will cause the rejection of all proposals for the work in which a Consultant is interested. If there is reason to believe that collusion exists among the Consultants, the City may refuse to consider proposals from participants in such collusion. Consultants shall submit as part of their proposals documents the completed Non-Collusion Declaration provided herein.

I, on behalf of the Consultant, declare under	penalty of perjury under the laws of the State of California
that the foregoing is true and correct and th	nat this declaration is executed on
[date], at Berkeley [city], C.	A [state].
Opticos Design, Inc.	President
Consultant Name (Person, Firm, Con	rp.) Title of Authorized Representative
2100 Milvia St., Suite 125	Karen Parolek
Address	Name of Authorized Representative
Berkeley, CA 94704	
City, State, Zip	
3/21/25	Karen & Parolek

(Signed)

(Date)

ATTACHMENT 3 - STATEMENT REGARDING INSURANCE COVERAGE AND WORKER'S COMPENSATION INSURANCE ACKNOWLEDGMENT CERTIFICATE

OBJECTIVE DESIGN AND DEVELOPMENT STANDARDS CONSULTANT SERVICES
THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

CONSULTANT HEREBY CERTIFIES that the Consultant has reviewed and understands the insurance coverage requirements specified in the RFP. Should the Consultant be awarded a contract for Services, Consultant further certifies that the Consultant can meet the specified requirements for insurance, including insurance coverage of any subcontractors, and agrees to name the **City of Carmel-by-the-Sea** as additional insured for the Services specified.

By certifying this form, the Consultant also understands the Worker's Compensation insurance requirement per the California Labor Code, Sections 1860 and 1861:

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

Opticos Design, Inc.
Printed Name of Consultant (Person, Firm, or Corporation)
V D
* aren & Tarolek
Karen E Parolek Signature of Consultant's Authorized Representative
Karen Parolek, Its President
Name & Title of Authorized Representative
3/21/25
Date Signed

Review of Scope



Project Approach

The Opticos team understands the City's commitment to **facilitating new housing** and achieving **high-quality design** in new ADUs, multi-family and mixed-use buildings. We propose the following approach to meet the community's objective of high-quality design that reinforces the identity and unique physical character of Carmel-by-the-Sea:

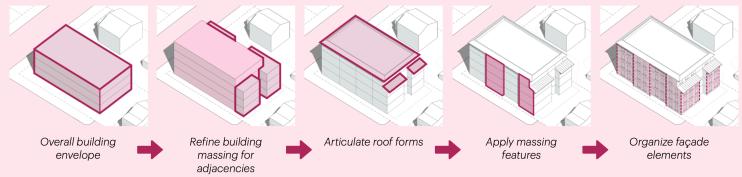
1. Draw on our deep experience preparing objective design and development standards (ODDS).

We have been preparing zoning standards through form-based codes for over 20 years across the US. We have used our national experience to prepare ODDS in 23 California jurisdictions in the past six years for a range of buildings similar to those envisioned in Carmel-by-the-Sea: from lower-intensity house-scale buildings to moderate and higher-intensity block-scale buildings. We recently completed the ABAG Handbook of Objective Design and Development Standards reflecting our experience in designing buildings and regulating building and site design through form-based codes.

We have a deep understanding of the large and small patterns in communities that contribute to their physical character and appeal. We find the following characteristics vitally important to visual appeal of buildings and their neighborhoods: the width of buildings as perceived from the street as well as their length as seen by neighbors across the property line; the scale of entries to a building, the way the building entry relates to the sidewalk (e.g., large front yard, porch, dooryard, terrace, shop front), where the parking is located, the height, massing and organization of each façade, the size and vertical orientation of openings, the eave type and its details. We will gather this important information, Carmel's "DNA," through microscale documentation of your desired outcomes. Through this experience and documentation, we will prepare ODDS that reflect Carmel-by-the-Sea's unique physical character and appeal.

Q CLOSER LOOK

Building Design Process



2. Identify standards for different scales of buildings and their contexts.

A common practice in the writing of design standards is to treat building design as simply bulk that improves as it's "chipped away." This approach often leads to compliant but unsatisfying design outcomes and frustrated applicants, as these practices don't work well with floor plans to produce much-needed housing. Instead of a general approach, we'll review what design approaches are valued by the community. We'll then identify the building massing and façade articulation standards effective on house-scale buildings distinct from those effective on larger block-scale buildings. This is also important to understand to develop the appropriate standards for smooth transitions between house- and block-scale buildings.

3. Provide predictable and realistic height transition standards.

We'll review the existing standards to see what's needed to improve compatibility between new and existing buildings on abutting parcels. For instance, house-scale massing techniques better achieve an effective transition in building size than simply requiring upper-story setbacks. Based on the allowed building envelope in each neighborhood, we'll coordinate the relevant building design, massing, and adjacency standards for effective and realistic transitions for infill development. We recommend the optional Task 4.7 Site Tests & Visualizations to show what new standards would produce on a specific parcel.

4. Make the new standards user-friendly, objective, and easy to implement to streamline the process.

Several of our team members previously worked as City planning staff, giving them a solid understanding of how standards need to be communicated to the designer, developer, administrator, and community member. We'll use that experience to review representative project plans and review processes to understand what's working and what could be refined or improved. With that background and over two decades of writing form-based zoning and design standards in compliance with State Law, we'll prepare clear standards, graphics, and diagrams to convey the community's requirements.

5. Work closely with you and the community.

Our work is much more effective when it's not seen as "the consultant's project" and instead is an engaged community and City staff investing in the project from start to adoption and implementation.

We will prepare for and facilitate the following outreach opportunities, which are further detailed in our proposed Work Plan Task 2. Targeted Community Engagement:

- Working Session with City Planning Staff to gain insight on outcomes seen as effective and if there is room for improvement.
- Local Design & Development Industry Roundtable Meetings (total two; virtual)
- Subcommittee Meetings (total two; virtual)
- Community Meeting (total one; in-person)



- Meetings with Review Boards (total two; one in-person and one virtual)
- Planning Commission and City Council Study Sessions (total two; virtual)

Through clear, open, and intentional communication, we maintain a highly collaborative process with City staff and the consultant team. To facilitate this, we include the following coordination methods, further detailed in Task 1. Project Kickoff & Management:

- Regularly scheduled team check-in calls using screen share and video conference.
- Project status updates that highlight task progress, identify key milestones and deliverable dates, and articulate action items, upcoming task responsibilities, and next steps.
- Shared cloud storage for team collaboration, including file sharing, project contacts, and real-time document collaboration.

We know things change and that any project management approach is only as good as its capacity to accommodate changing realities. By facilitating a collaborative approach founded on open communication and accessible project information, it is our intent to create a team structure that makes it possible to identify changes early-on, and to efficiently pivot as needed to accommodate that change.

6. Tailor a work plan that builds on the Proposed Scope of Services outlined in the RFP.

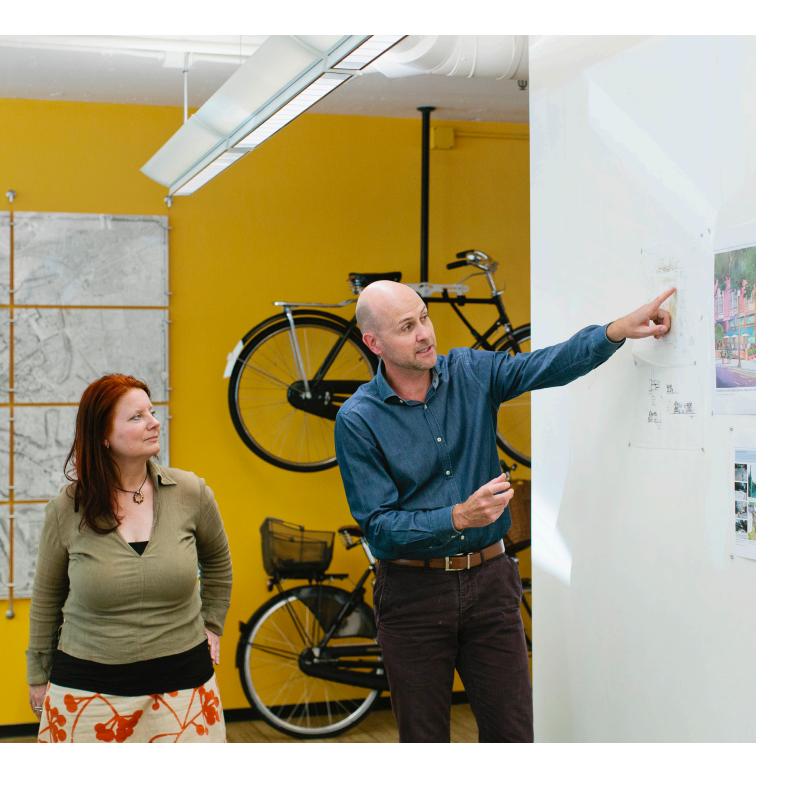
We propose a work plan that focuses on the City's objective for ODDS to address high quality building design, architectural style, and height transitions. To accomplish this, we propose the following key questions to guide our work throughout the project process:

- What specifically needs to be regulated and to what degree?
- Are the standards responsive to the community's expectations and the needs of the local development industry?

Our work plan is aimed at ultimately producing a standalone document of design standards to be adopted by resolution. We provide a detailed work plan as an Appendix that incorporates the Proposed Scope of Services outlined in the RFP and includes additions tailored to successfully complete this project.



Experience + Expertise



Who We Are



Opticos is a team of urban designers, architects, and strategists that partners with clients who want to lead the way in providing vibrant, diverse, walkable urban places. Because we approach each project with innovation and creative problem solving in mind, we function just as much as a think tank as a consulting firm.

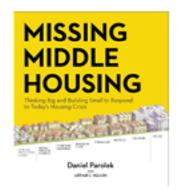
To us, architecture and planning must play a role in defining more sustainable, equitable, healthy, compact patterns of development that improve the quality of life for everyone. This starts with revitalizing existing urban places, but also must include the transformation of suburban places into more urban ones and the creation of thoughtful, new walkable urban communities.



As a group of like-minded designers looking to make an impact in the world, we strive to integrate social, environmental, and economic responsibility into all that we do. Professionally, we're one of the first B Corporations and a founding California Benefit Corporation, a revolutionary new kind of business dedicated to a triple bottom line. Outside of work, we shop locally, live small, and go car-free whenever possible. The only parking issue we experience in our office is a shortage of bike racks!

Architects of Missing Middle Housing





Opticos Founder Daniel Parolek authored the book "Missing Middle Housing: Thinking Big and Building Small to Respond to Today's Housing Crisis."

Architects of the Missing Middle Movement

Opticos Design is well known as the architects of the Missing Middle Housing movement. In 2010, Opticos Principal Dan Parolek coined the term, in 2014 we created the Missing Middle Housing diagram, and in 2015 the company launched a free online resource for all: missingmiddlehousing.com. Hundreds of thousands of visitors visit the website each year, and it was voted one of Planetizen's top 10 Planning Websites of 2019.

Daniel Parolek recently completed a book titled "Missing Middle Housing: Thinking Big and Building Small to Respond to Today's Housing Crisis," published by Island Press in July 2020. Opticos Design and the concept of Missing Middle Housing have been featured in publications such as the Washington Post, San Francisco Chronicle, Next City, Professional Builder Magazine, Urban Land, and the National Association of Realtor's publication, On Common Ground. Daniel and the Opticos team have given hundreds of presentations and webinars on this topic. In 2017, Opticos was selected by AARP to educate AARP members about the value of walkable living and Missing Middle Housing choices. We are passionate about educating communities about this topic.

Missing Middle Housing has become a movement that is informing housing solutions across the county and internationally.

























Missing Middle Housing provides homebuilders with a practical way to address changing market and demographic trends diversifying their portfolios and investing in communities in the process."

Amy Albert Editor-in-Chief, Professional Builder



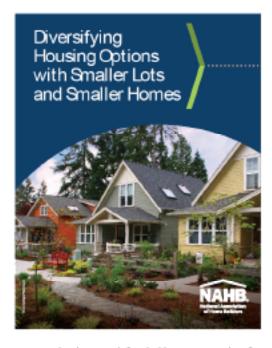
Public Sector Services

Opticos Design works with public agencies, including Cities and Counties, to remove barriers and enable Missing Middle Housing. Specifically, we offer Missing Middle Scans™ to identify barriers in Comprehensive Plans, housing policies, Specific Plans, and area plan. We then suggest targeted zoning fixes or comprehensive updates to zoning codes and/ or plans for areas such as downtown-adjacent neighborhoods, areas transitioning from Transit-Oriented Development, and corridors focused on enabling this range of housing choices.

Private Sector Services

Opticos Design works with developers to integrate innovative Missing Middle housing product types into their portfolios to respond to the gap in the housing market. This work includes master planning and architecture ranging from individual infill lots to hundreds of acres. Missing Middle Housing types help bridge the gap between what the market wants and needs, and what is being provided. This work includes multifamily and for sale housing on both small and large sites. Opticos Design worked on the country's first Missing Middle Neighborhood, Prairie Queen, in the Omaha, Nebraska metro. Opticos also worked on the award-winning project known as Mews Housing located in the Salt Lake City Region. The project received a Charter Award from the Congress for New Urbanism and a Gold Nugget Award in 2019. Finally, we also worked on an award-winning Pocket Neighborhood in Healdsburg, California that won support in a challenging community due its thoughtful design.

The movement has begun. Will you play your role in responding to today's housing crisis?



Opticos lead research funded by NAHB to identify zoning best practices being used across the country.

Press:

The Washington Post

Professional Builder







Podcasts & Radio:





Our **California** Objective Design + Development Standards Experience



- Marin County and 11 cities (5 customized by Opticos
- 2 City of Campbell (Downtown and Citywide)
- 3 City of San Rafael (Downtown)
- 4 City of Davis (Downtown)
- **5** City of Folsom
- 6 City of Orinda (Downtown and Citywide)
- 7 City of Sebastopol (Downtown and Citywide)
- 8 City of Santa Barbara (Downtown and Cltywide)
- ABAG (Handbook on ODDS)
- 10 City of Richmond
- 11 City of Citrus Heights
- **12** City of Los Altos
- 13 City of Mountain View
- 14 City of Santa Rosa
- 15 City of Lafayette

• Carmel-by-the-Sea



The Opticos team's unique skills, approach and experience align well with the City's desire to create ODDS that promote high-quality design and architectural standards to the existing ODDS. The following pages elaborate on the key areas of expertise that make our team a good fit for Carmel-by-the-Sea and present recent examples of relevant projects:



ODDS + 20 Years of Form-Based Coding



Implementation Expertise



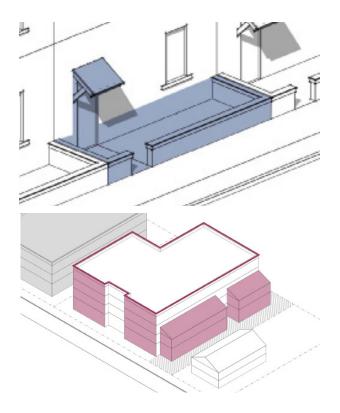
High-Touch + High-Tech Outreach

Objective Design and Development Standards (ODDS) + Coding

Opticos Design brings its 20+ years of zoning and form-based code experience across the U.S. to prepare objective design and development standards for over a dozen California cities. We've been preparing zoning and standards for a long time so when cities asked us to prepare ODDS, it was a natural for us. We prepare ODDS to implement the community's RHNA goals while delivering buildings and designs that fit their context and location, for a streamlined review process.

Our ODDS strategy is to refine or replace existing zoning to improve housing yield, built form, and increase usability rather than simply adding another layer of regulations.





We'll customize your standards.

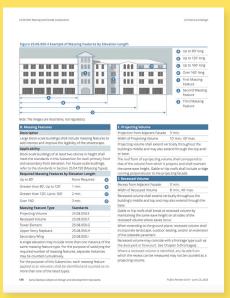
- 1 Menu of design and development standards for you to choose from depending on your housing goals and community expectations.
- Working with you upfront to understand what your community wants the standards to make.
- 3 Testing the standards throughout the process to make sure and make what's expected and prevent what's not wanted
- **4** Easy to use, graphically-rich design and development standards.



Producing more housing through **contextsensitive**, objective standards







Downtown and Citywide ODDS for the City of Santa Barbara

High-Touch + High-Tech Outreach for Effective, Equitable Engagement



Our Community Engagement Toolbox: Developed and Refined Through 20 Years of Working with Neighborhoods Nationwide

We utilize collaborative design, a curated engagement toolbox and local knowledge to effectively guide engagement in your community

Opticos integrates a robust, hands-on public engagement strategy into all of our planning and coding processes in order to ensure community ownership and effective implementation. Our first multi-day charrette was 20 years ago, when we participated in an extremely contentious charrette led by Bill Lennertz, former Executive Director of the National Charrette Institute, which went on to be the case study for The Charrette Handbook. To put it simply, we learned from the best on one of the most complicated but highly successful charrette processes in the country. Since then, we have refined



and adapted our charrette process for a variety of challenging situations to gain consensus and effectively engage underserved communities. We've worked all over the country, including over 30 communities in California. Over the years, we have expanded beyond the charrette to develop our Community Engagement Toolbox that includes a variety of techniques for effective communication, both verbal and graphic. We adapt our approach for each project to meet its and the community's individual needs.









Involving Underrepresented Communities in the Planning Process

We actively include local community outreach specialists with "boots on the ground" experience to ensure that our community engagement process identifies those historically left out of the planning process, and embeds them in decision-making. Key strategies include:

- Go to them. Often within these populations there exists apathy or mistrust rooted in history. The first step is showing respect by extending and showing up on their turf at community meetings, markets or festivals. Connect with those who have trusting relationships with the community such as religious leaders, social support organizations and sports leaders. Let these people take the lead on how to connect with their community.
- **Communicate.** Don't discount the use of social media and online engagement. Covid-19 has increased the percentage of people who can participate online.
- Build trust. Make the process worth their participation. Underserved communities may not see it worth the effort to get involved. Often there is a history of disappointments related to unfulfilled promises. The most important first step is to just listen, allowing people to express the important issues. The project team must then propose design solutions that respond to peoples values and issues. People must believe that their input can have an impact on their community.

Qualifications



Meet the Team

Opticos has assembled a team of highly skilled professionals who combine extensive technical qualifications and numerous years of experience working in the region. Below is our team's organization chart of key staff followed by their resumes. We will maintain the same personnel throughout the project; however, if any change is required due to unforeseeable circumstances, we will seek the City's approval in advance through personnel qualifications review and oral interviews with City staff.

CITY OF CARMEL-BY-THE-SEA

OPTICOS DESIGN, INC.



Stefan PallegriniFounding Principal



Tony Perez Senior Associate, Zoning Reform & Planning



Drew FinkeSenior Associate,
Urban Design



Cecilia Kim Associate II



Xenia Alygizoue Associate I

<mark>S</mark>tefan Pellegrini, RA, AICP, LEED AP





Education

Master of Urban Design University of California, Berkeley

Bachelor of Architecture Magna Cum Laude University of Notre Dame

Licenses

California Licensed Architect #C32904

Memberships

American Institute of Certified Planners Certificate #020186

American Planning Association (APA) Small Town and Rural (STAR) Division

Relevant Project Experience

Objective Design Standards Handbook for Residential and Mixed-Use Projects, Association of Bay Area Governments

Marin Objective Design + Development Standards Toolkit Marin County, CA

Puget Sound Regional Missing Middle Zoning Toolkit & Resources, Puget Sound Region, WA

Livable Corridors Form-Based Code + Architectural Standards Richmond. CA

Downtown Specific Plan and FBC Hayward, CA

Principal

Stefan Pellegrini's educational degrees and professional experience in both architecture and urban design make him an expert project leader at all building scales, from single-family homes to regional plans. He has extensive experience traveling and teaching workshops abroad, a roster of groundbreaking and award-winning projects to his credit, and he is uniquely skilled at bringing diverse people and opinions together at the table to resolve conflicts and turn disagreements into productive projects. Adept at analyzing a place and drawing his ideas on paper, with a passion for traditional architecture, Stefan meticulously considers every aspect and angle of a project to create beautiful places and spaces that thrive.

His strong interest in revitalizing places, especially rural small towns and inner-city areas, comes from a childhood spent in the rust belt town of Muncie, Indiana, seeing first-hand the impact of declining industry. Before joining Opticos in 2002, Stefan brought this understanding to his work at the nationally renowned firm Urban Design Associates in Pittsburgh, Pennsylvania, where he was a senior designer and project manager for over 50 urban design and architecture projects, including groundbreaking plans that redesigned public housing into mixed-income communities through the HOPE VI program in five states (one of which won an AIA Honor Award for Urban Design), and new housing developments in North Carolina and Alabama. He also played an instrumental role in UDA's resurrection of Architectural Pattern Books.

Stefan brings an international perspective to the firm. The recipient of a number of fellowships, including the prestigious Skidmore, Owings, and Merrill Foundation Urban Design Traveling Fellowship, he has spent months studying architecture and planning all over the world, including Scandinavia, North Africa, and Southern Europe. In addition, Stefan is fluent in Italian.

Tony Perez





Education

B.S. Urban and Regional Planning, Cal Poly Pomona

Teaching

Instructor: PLAN 590 "Place-based Planning, Design, and Zoning", Spring 2025

Instructor: UP 252 "Form-Based Planning + Coding" UCLA, Winter 2015 and 2016

Instructor: URP 498 "Form-Based Planning + Zoning" Cal Poly Pomona, Spring 2013, 2017, 2018

Instructor: FBC 101 + 201, Form-Based Codes Institute

Relevant Projects

Multi-Family Development and Design Standards, Campbell, CA

Objective Design and Development Standards, San Anselmo, CA

Objective Design and Development Standards, Santa Barbara, CA

Objective Design Standards Handbook for Residential and Mixed-Use Projects, Association of Bay Area Governments

Folsom Corridor Objective Design and Development Standards, Folsom, CA

Marin Objective Design + Development Standards Toolkit, Marin County, CA

Senior Associate, Team Leader

Tony leads Opticos' Zoning Reform and Planning Team to focus on a variety of zoning work: Zoning audits, Missing Middle Housing Scans, Form-Based Code and Objective Design and Development Standards preparation, and citywide Zoning Ordinance Updates. With 36 years of experience, including 12 as a public sector planner, Tony Perez has spent the last 24 years helping communities improve their zoning codes with a focus on writing Form-Based Codes. An expert in translating policy direction into clear and implementable development standards, Tony works to enable the community's vision by identifying and addressing barriers and writing responsive standards.

A leader in advancing the implementation of Missing Middle Housing as well as the practice of Form-Based Codes, Tony is an energetic educator and enjoys working with public sector planners across the United States.

Tony is from the California Delta town of Isleton and lives with his family in Southern California.

Drew Finke





Education

Master of Urban + Regional Planning UCLA

Bachelor of Architecture University of Texas at Austin

Bachelor of Arts in Urban Studies University of Texas at Austin

Relevant Project Experience

Livable Corridors Form-Based Code + Architectural Standards Richmond, CA

Downtown Specific Plan and FBC Hayward, CA

Urban Design Guidelines Memphis, TN

Bitterroot Ranch Design Guidelines Hamilyton, MT

CodeNEXT Citywide Code Update Austin, TX

South County Community Plan and FBC Kauai County, HI

West County Community Plan and FBC Kauai County, HI

Senior Associate

Drawing on his training in architecture and planning, Drew's work sustains and strength-ens local culture and traditions through thoughtful, community-driven designs and policies that reinforce a community's unique sense of place. Drew's work is animated by an interest in how walkable, equitable, sustainable and beautiful neighborhoods, main streets and downtowns can thrive in a wide range of contexts, be they big cities or small towns.

Since joining Opticos in 2013, Drew has applied this sensibility to impactful projects in a variety of places, from an award-winning place-based comprehensive plan and follow-up implementation charrettes in Memphis, Tennessee, to contextually-sensitive form-based codes for rural Kaua'i County in Hawai'i, and neighborhood plans for an affordable Missing Middle Housing neighborhood in Mammoth Lakes, California. Uniting these projects is an emphasis on authentic community engagement and feasible implementation strategies that empower communities and provide confidence in the face of change.

Drew enjoys getting to know a place through its food, and can be found at farmers markets and local dives whenever visiting a new place.

Cecilia J. Kim, PhD





Education

PhD in Planning, Policy and Design, University of California, Irvine

MPL in Planning, University of Southern California, Los Angeles

ME in City Planning, Hongik University, Seoul

BE in Civil and Urban Engineering, Hongik University, Seoul

Memberships

American Planning Association

Urban Land Institute

Congress of the New Urbanism

Relevant Project Experience

Objective Design Standards
Handbook for Residential and Mixed-Use Projects
Association of Bay Area
Governments

Multi-Family Development and Design Standards Campbell. CA

Folsom Corridor Objective Design and Development Standards, Folsom, CA

Citywide Zoning Code Columbus, OH

Planning Manager (Associate II)

With a unique educational and professional background that blends the disciplines of design, planning, and engineering, Cecilia brings a distinctive perspective and solution-oriented approach to leadership and project management. She excels at translating visions into visual graphics that help engage the community and spark the creative design process of projects. Her personal mission is to have a positive impact on the communities she works with to create long lasting places of value and strong community connections.

Throughout her two decades of experience, Cecilia has adeptly handled multiple roles as project manager, urban designer, and policy planner. She is skilled at coordinating projects across diverse professional disciplines, mediums, and departments. From land use and community engagement to development regulations and sustainability policies, Cecilia's wide range of knowledge and experience has helped clients find creative solutions through collaborative and innovative efforts. She has a particular passion for development codes and specializes in form-based codes and objective design and development standards.

Cecilia's passion for urban design and planning began as a child fascinated with building a Lego city in her closet. She continues to cultivate this passion in young planners through mentorship and teaching, having taught at the University of California, Irvine and California State University, Northridge. Outside of the studio, she enjoys playing tennis and is a national champion as part of the winning team in the 2016 Mylan WTT Rec League.

Publications

Garde, A. & Kim, C. (2017). Form-Based Codes for Zoning Reform: Insights from Cities in Southern California. Journal of the American Planning Association, 83 (4), 346-364

Garde, A., Kim, C. & Tsai, O. (2015). Form-Based or Euclidean Zoning Codes? Learning from Miami 21. Journal of the American Planning Association, 81 (1), 46-66

John Randolph Haynes and Dora Haynes Foundation. (2014). Evaluation of the effectiveness of form-based codes in promoting sustainability: Insights from Southern California. Los Angeles, CA: Garde, A. (Grant Report).

Xenia Alygizou, AAA, AICP





Education

Master in Public Anthropology Boston University

Master of Urban Design University of California, Berkeley

Master and Bachelor in Architectural Engineering National Technical University of Athens

Memberships

American Anthropological Association (AAA)

American Planning Association (APA), APA California

Association of Cultural Heritage

European Association of Social Anthropologists

Relevant Project Experience

Sacramento Missing Middle Study, Sacramento, CA

San Rafael Downtown Precise Plan San Rafael. CA

Puget Sound Regional Missing Middle Zoning Toolkit & Resources, Puget Sound Region, WA

Midtown Development Plan + FBC Santa Fe, NM

Urban Design Guidelines Memphis, TN

Associate I

Xenia is an architect, urban designer, and sociocultural anthropologist. Her cross-discipline approach is rooted in her keen awareness of the cultural, social, and physical elements that shape urban environments. Since joining Opticos Design in 2017, she has drawn on her diverse educational background and extensive experience to contribute to a wide range of urban design and planning projects across communities in the United States.

Xenia dedicates her work to advancing urban places through the lenses of lived experiences, urban storytelling, place analysis, and community engagement. She specializes in integrating cultural and physical insights into comprehensive plans, master plans, form-based codes, and innovative design concepts, ensuring that each project is contextually sensitive and future-ready. Her role extends beyond design; she works with residents and city staff to define their visions via urban planning principles.

In addition to her work at Opticos, Xenia serves on the board of Mary Elizabeth Inn, a nonprofit organization in San Francisco dedicated to providing safe and supportive housing for women in need. When she is not in the design studio, Xenia can be found in Berkeley and San Francisco neighborhoods, hiking somewhere on the California coast, baking, or writing. Her most recent pieces include anthropological research on the emerging participatory planning in the Eastern Mediterranean, and migration patterns in the small isolated islands of the Aegean Archipelago.

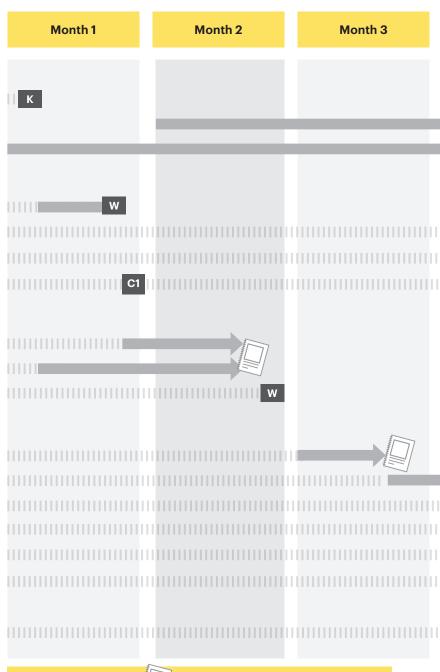
Timeline



Project Schedule

The Opticos team proposes to complete the project within eight months, as shown below, for the base scope of work. This schedule assumes staff review period of two weeks per deliverable and does not include time for the scheduling and holding of public hearings. Opticos will work with City staff to refine the schedule at project startup and provide updates throughout the duration of the project.

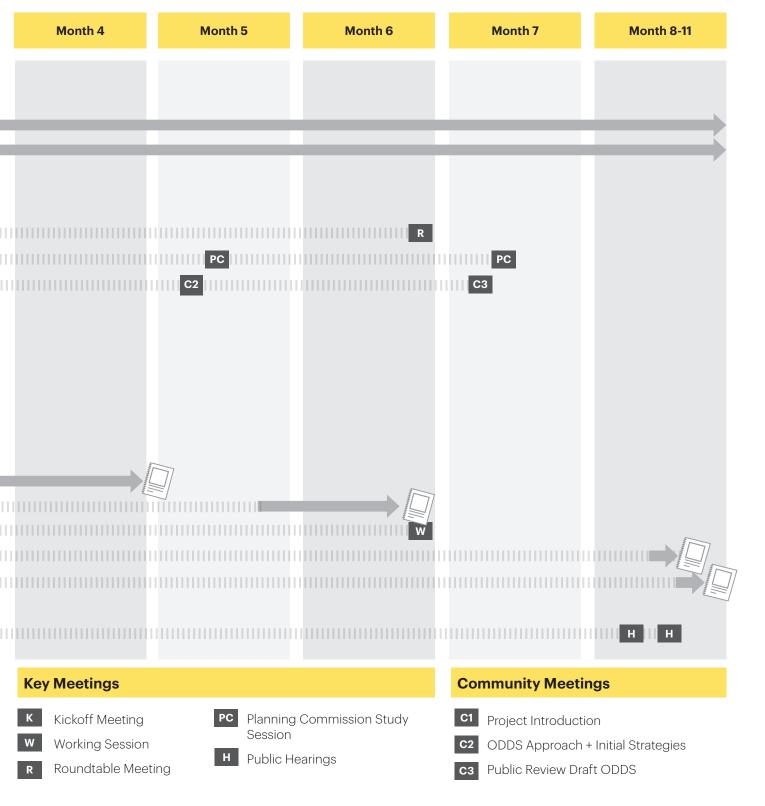
Task 1 Project Startup & Management 1.1 Project Startup & Kickoff Meeting 1.2 Coordination calls with City (12) 1.3 Administration & Quality Control **Task 2 Targeted Community Engagement** 2.1 Working Session #1: Key Projects/Outcomes 2.2 Local Industry Roundtable Meeting #1 2.3 Planning Commission Study Sessions (2) 2.4 Community Meetings (in-person) (3) Task 3 Research 3.1 Field Visit and Microscale Documentation 3.2 Review of Background Documents and Key Projects 3.3 Working Session #2: Findings and Recommendations **Task 4 Objective Standards** 4.1 Outline for ODDS 4.2 Administrative Draft ODDS 4.3 Public Draft ODDS 4.4 Working Session #3: Public Draft ODDS 4.5 Final ODDS, as adopted 4.6 ODDS Checklist **Task 5 Public Meetings** 5.1 Meeting Attendance & Support (2)



- Key Deliverables
- Outline for ODDS
- Administrative Draft ODDS

· Summary of Findings Memo

- Public Draft ODDS
- Final ODDS
- ODDS Checklist



Samples



Project Samples

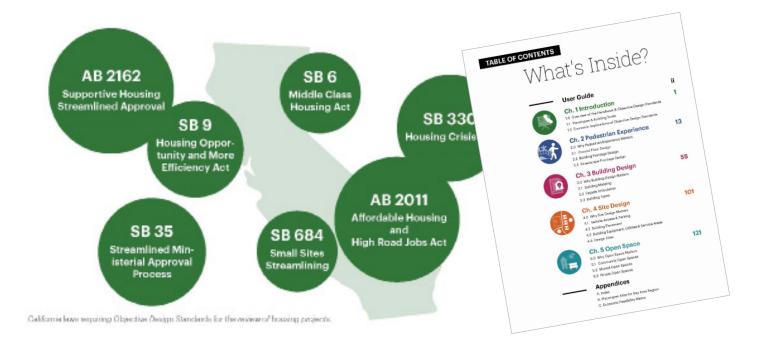
This section provides project samples for the Opticos team. The list below provides links to the project for your review.

Opticos Design, Inc.

- Objective Design Standards Handbook, Association of Bay Area Governments
- Objective Design and Development Standards, Santa Barbara, CA (Adopted)
- Objective Design and Development Standards, San Anselmo, CA (Adopted)

Objective Design Standards Handbook

San Francisco Bay Region, California | 2024



Project Area + Context

San Francisco Bay Region

Degree of Change

Evolution with Targeted Transformation

Products

Placetypes Atlas; ODS Handbook; Catalogue of readyto-use standards

Status

Completed and being used by local jurisdictions

Team

Opticos Lead; Cascadia Partners (Economic)

Reference

Ada Chan, Regional Planner Association of Bay Area Governments Metropolitan Transportation Commission 375 Beale Street, Ste 800 San Francisco, CA 94105 415.820.7958 achan@bayareametro.gov

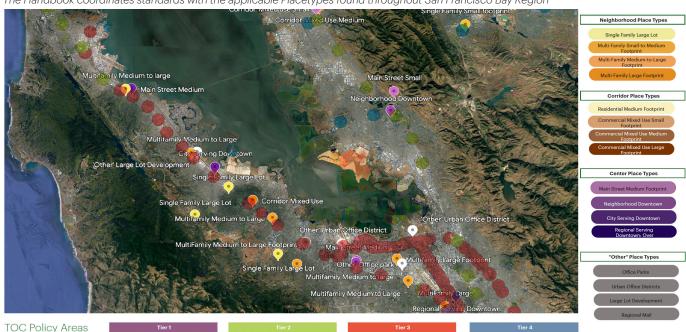
Expert Advice and Best Practices in Preparing Objective Design Standards

In 2023, the 9-County Association of Bay Area Governments hired Opticos to prepare a resource for its 101 jurisdictions to streamline housing production. The California legislature has passed several laws to increase and streamline housing production. A key need from those laws is to approve certain projects administratively, without discretionary review, using only objective standards.

Working with a 17-member steering committee, Opticos prepared a Handbook of Objective Design Standards (ODS) that addresses four key design topics: Pedestrian Experience, Building Design, Site Design, and Open Space. The Handbook advises why and when to include certain standards along with economic implications provided by Cascadia Partners. The standards are coordinated to six sizes/intensities of neighborhoods, corridors, and centers (i.e., placetypes), enabling readers to easily find the type of area they want, the advice, and example standards to inform or use directly.

Highlights

- Placetypes analysis established foundation for the key design topics and objective standards included in the Handbook.
- 2. The Handbook includes objective standards for essential and supplemental topics.
- 3. The Handbook is intended to be used as a reference by jurisdictions to **customize** and refine their local **ODS**.

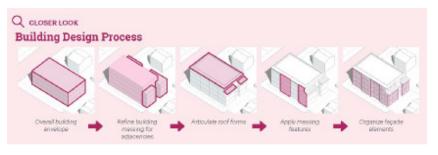


The Handbook coordinates standards with the applicable Placetypes found throughout San Francisco Bay Region

The Handbook is absolutely responsive to our region's needs. Opticos produced a truly **innovative resource** that we knew we needed but didn't know what it would be."

Ada Chan

Bay Area Metro



The Handbook provides ways to craft standards so that individual buildings are designed in response to their intended physical scale and context.

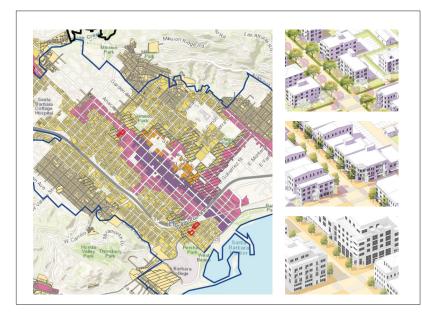


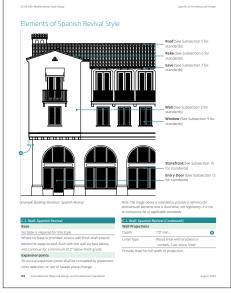
Economic analysis conducted by Cascadia Partners provides insight on considerations to balance project costs with long-term placemaking benefits.



Objective Design Standards

Santa Barbara, California | 2024





The ODS completely replaces existing zoning districts and replaces existing architectural guidelines

Project Area + Context

Citywide

Downtown, Neighborhood Main Streets, low to moderate intensity Neighborhoods and Corridors

Degree of Change

Envisioned Transformative Change

Budget

\$304,745

Status

Pending Adoption in Summer 2024

Team

Opticos

Reference

Rosie Dyste, Project Planner 805.564.5470 x4599 rdyste@SantaBarbaraCA.gov

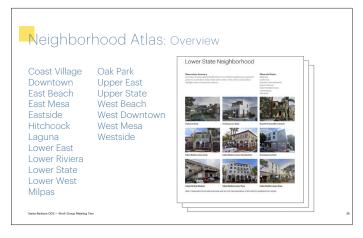
New zoning and architectural standards intended to streamline housing production

Opticos was hired to prepare Citywide Objective Design Standards (ODS), which included both the creation of zoning districts and the replacement of the comprehensive but sometimes subjective existing architectural guidelines. To ensure the new standards were place-based, the first step was to analysis the different neighborhoods and their characteristics and categorize them in a Neighborhood Atlas. The city's goals for this project were:

- · Facilitate and streamline production of multi-unit housing
- Provide clear guidance and design expectations to applicants, staff, and decision makers.
- Ensure all new multi-unit housing development is designed to be sensitive and compatible with existing architecture, historic resources, and neighborhoods.
- Use an open and inclusive public process to draft design standards for the City's diverse multi-unit neighborhoods.

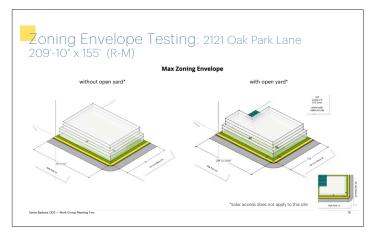
Highlights

- 1. ODS being prepared for a community with a strong design review culture.
- 2. Preparing ODS that help rather than limit the very creative architectural community.
- 3. Creating **context-sensitive** ODS founded on detailed place analysis
- 4. Preparing Objective Architectural Style Standards that leave room for creativity.



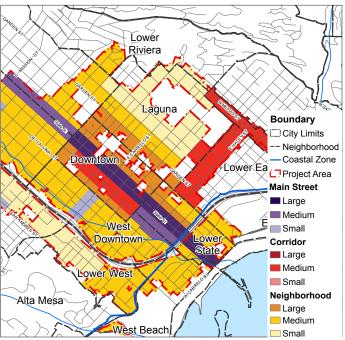
Neighborhood Atlas

Careful analysis of the characteristics of different neighborhoods was compiled into a Neighborhood Atlas that informed which new zoning and architectural standards would apply to each neighborhood.



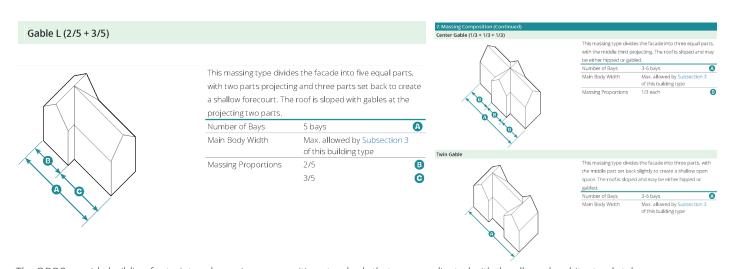
Test Fits

After the initial draft of the zoning were completed, the team tested potential build out on several typical lot sizes within each zoning district.



Wow, Opticos tackled this challenging problem very thoroughly and effectively, and created a document that achieved something I was not sure was possible."

City of Santa Barbara

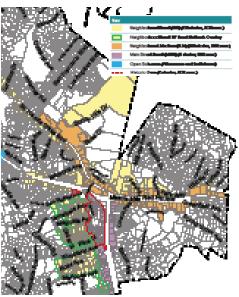


The ODDS provide building footprint and massing composition standards that are coordinated with the allowed architectural styles.

Objective Design and Development Standards

San Anselmo, California | 2024





Project Area + Context

Citywide - Properties zoned for multi-family and commercial mixed-use development

Degree of Change

Envisioned Transformative Change

Products

Objective Design Standards including site visualizations, new zoning and architectural standards

Status

Adopted

Reference

Heidi Scoble, Planning Director Town of San Anselmo 415-258-4636 hscoble@townofsananselmo. org

New Zoning and Architectural Standards Provide Alternative Ministerial Path to Planning Approvals

The Town of San Anselmo hired Opticos Design Inc., to customize the Marin County ODDS Toolkit, a form-based code that Opticos developed for Marin County cities and towns. The intent of the ODS is to provide applicants and developers with a clear understanding of the Town's expectations for multi-family and commercial mixed-use developments. The ODS provide clear and effective standards to streamline review processes and enable more housing production.

Highlights

- 1. ODS standards address proposed **Housing Element** densities.
- 2. Opticos prepared **visual simulations for five housing sites** to demonstrate standards.
- 3. ODS standards for public frontage allow transition to existing frontage conditions.
- 4. **Engagement with Planning Commission Subcommittee** composed of two local architects.

A) 100 Center/613 Sir Francis Drake Blvd | Site Test



Front Setbacks	Proposed	Required
Sir Francis Drake	5'	10' min., 15' max.
Center Blvd	10'-15'	10' min., 15' max.
Bridge Ave	10'	10' min., 15' max.







D) 58 Magnolia Ave | Site Test

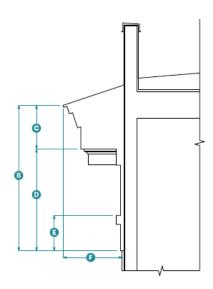


Existing Grade

Site Plan Key

Above: Town staff directed Opticos to test specific site development scenarios. The test results were used to refine the ODS standards.

Left: Existing buildings informed the Architectural standards.



Above and Right:

ODS standards focused on regulating architecture and site design.



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Disclosure of Litigation

Opticos has neither been disciplined or censured by any regulatory body, nor, within the last five years, been involved in litigation or other legal proceedings relating to the provision of services.

References



ATTACHMENT 2 - REFERENCES

OBJECTIVE DESIGN AND DEVELOPMENT STANDARDS CONSULTANT SERVICES
THIS FORM MUST BE PRINTED OUT, COMPLETED AND SUBMITTED WITH THE PROPOSAL

List three (3) references for work of a similar nature to the Services performed within the last five (5) years. Use additional sheets as necessary.

Reference No. 1.

County of Marin, CA	3501 Civic Center Dr Ste 329, San Rafael, CA 94903				
Name of Agency	Agency Address				
Jillian Nameth Zeiger	Principal Manager				
Contact Name	Contact Title				
415-473-7549	jillian.zeiger@marincounty.gov				
415-473-7549 Contact Telephone	jillian.zeiger@marincounty.gov Contact Email Address				

Description of services performed including costs.

Prepared Objective Design and Development Standards Toolkit for 11 jurisdictions in Marin County. Also provided supporting services, ranging from architectural style documentation, site testing, and meeting facilitation.

Reference No. 2.	525 San Anselmo Avenue, Second Floor			
Town of San Anselmo	San Anselmo, CA 94960			
Name of Agency	Agency Address			
Heidi Scoble	Planning and Building Director			
Contact Name	Contact Title			
415-258-4636	hscoble@townofsananselmo.org			
Contact Telephone	Contact Email Address			
2019-2023, adopted	\$153,000			
Contract Period	Contract Amount			

(next page)

Description of services performed including costs.

The Town of San Anselmo hired Opticos Design Inc., to customize the Marin County ODDS Toolkit, a form-based code that Opticos developed for Marin County cities and towns.

Reference No. 3

Metropolitan Transportation Committee (MTC) Bay Area Metro Center Association of Bay Area Governments (ABAG) 375 Beale St, Ste 800, San Francisco, CA 94105

Name of Agency Address

Ada Chan	Regional Manager, Regional Planner
Contact Name	Contact Title
415-820-7958	achan@bayareametro.gov
Contact Telephone	Contact Email Address
9/20/22 - 4/30/24	\$400,000
Contract Period	Contract Amount

Description of services performed including costs.

Facilitated 5 Technical Advisory Committee workshops with member jurisdictions.

Prepared Handbook of ODDS showing the reason for certain standards, when to consider applying certain standards, downloadable graphics, diagrams, and standards and provisional numerical values, plus editable files for jurisdictions to customize for their needs.

I hereby certify that the Consultant performed the work listed above.

$V \in \mathcal{P}$
Karen & Farolek
Consultant Signature
Karen Parolek, Its President
Printed Name
3/21/25
Date
Date

Insurance Coverage





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 7/18/2024

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

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on

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AssuredPartners Design Professionals Insurance Services, LLC 3697 Mt. Diablo Blvd Suite 230				PHONE (A/C, No, Ext): 626-696-1899 FAX (A/C, No):							
Lafayette CA 94549				E-MAIL ADDRESS: CertsDesignPro@AssuredPartners.com							
,				INSURER(S) AFFORDING COVERAGE				NAIC#			
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Pol	ured owns no company vehicles; therefo cies: General Liability/Auto Liability/Emp	re, ni olove	ırea/n rs Lia	on-owned auto is the maxi bility.	mum coverage	tnat a	ipplies. The t	Jmbrella Policy is	s tollow to	rm to it	s underlying
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								ESCRIBED POLIC			
					THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.						
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THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

TOTAL AGGREGATE LIMIT OTHER THAN PROJECTS AND DESIGNATED PROJECT AND LOCATION **AGGREGATE LIMITS**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE - LIMITS OF INSURANCE AND DESIGNATED PROJECTS AND LOCATIONS LIMITS OF INSURANCE

Total Aggregate Limit (Other Than Projects and Products-Completed Operations)	\$ 4,000,000
Designated Location Aggregate Limit (Other Than Products-Completed Operations)	\$ 4,000,000
Designated Project Aggregate Limit (Other Than Products-Completed Operations)	\$ 4,000,000
General Aggregate Limit (Other Than Products-Completed Operations)	\$ 4,000,000

Designated Projects:

Each "project" for which you have agreed, in a written contract which is in effect during this policy period, to provide a separate General Aggregate Limit, provided that the contract is signed by you before the "bodily injury" or "property damage" occurs.

Designated Locations:

All locations listed in Item 3. of the Common Policy Declarations or in any Master Pac Account Exposure Endorsement included in this policy.

PROVISIONS

- 1. The General Aggregate Limit (Other Than Products-Completed Operations) shown in the Declarations is replaced by the Limits of Insurance shown in the Schedule - Limits Of Insurance And Designated Projects And
- 2. The following replaces Paragraph 1. of SECTION **III - LIMITS OF INSURANCE:**
- 1. The Limits of Insurance shown in the Declarations or the Schedule - Limits Of Insurance And Designated Projects And Locations, whichever apply, and the rules below fix the most we will pay regardless of the number of:
 - **a.** Insureds:
 - **b.** Claims made or "suits" brought:

- c. Persons or organizations making claims or bringing "suits"; or
- d. "Projects" or "locations".
- 3. The following replaces Paragraph 2. of SECTION III - LIMITS OF INSURANCE:
 - 2. a. The Total Aggregate Limit shown in the Schedule - Limits Of Insurance And Designated Projects And Locations is the most we will pay for the sum of all amounts under the Designated Location Aggregate Limit and all amounts under the General Aggregate Limit. This includes:
 - (1) Damages under Coverage A, except damages because of "bodily injury" or "property damage" included in the "products-completed operations hazard";
 - (2) Damages under Coverage B; and
 - (3) Medical expenses under Coverage C.
 - **b.** The Designated Project Aggregate Limit shown in the Schedule - Limits Of Insurance And Designated Projects And Locations applies and is further subject to all of the following provisions:
 - (1) The Designated Project Aggregate Limit is the most we will pay for the sum of:
 - (a) Damages under Coverage A because of "bodily injury" and "property damage" caused by "occurrences"; and
 - **(b)** Medical expenses under Coverage C for "bodily injury" caused by accidents;
 - that can be attributed only to operations at a single "project".
 - (2) The Designated Project Aggregate Limit applies separately to each "project".
 - (3) The Designated Project Aggregate Limit does not apply to damages because of "bodily injury" or "property damage" included in the "productscompleted operations hazard". Instead. the Products-Completed Operations Aggregate described in Paragraph 3. below applies to such damages.
 - (4) The Designated Project Aggregate Limit does not apply to damages

- under Coverage B. Instead, the General Aggregate Limit described in Paragraph 2.d. below applies to such damages.
- (5) Any payments made for damages or medical expenses to which the Designated Project Aggregate Limit applies will reduce the Designated Project Aggregate Limit for the applicable "project". Such payments will not reduce the Total Aggregate Limit, the General Aggregate Limit described in Paragraph 2.d. below. the Designated Project Aggregate Limit for any other "project" or the Designated Location Aggregate Limit.
- **c.** Subject to the Total Aggregate Limit described in Paragraph 2.a. above, the Designated Location Aggregate Limit shown in the Schedule - Limits Of Insurance And Designated Projects And Locations applies and is further subject to all of the following provisions:
 - (1) The Designated Location Aggregate Limit is the most we will pay for the sum of:
 - (a) Damages under Coverage A because of "bodily injury" and "property damage" caused by "occurrences"; and
 - **(b)** Medical expenses under Coverage C for "bodily injury" caused by accidents;
 - that can be attributed only to operations at a single "location".
 - (2) The Designated Location Aggregate Limit applies separately to each "location".
 - (3) The Designated Location Aggregate Limit does not apply to damages because of "bodily injury" or "property damage" included in the "productscompleted operations hazard". Instead, the Products-Completed Operations Aggregate Limit described in Paragraph 3. below applies to such damages.
 - (4) The Designated Location Aggregate Limit does not apply to damages under Coverage B. Instead, the General Aggregate Limit described in

Paragraph **2.d.** below applies to such damages.

- **(5)** Any payments made for damages or medical expenses to which the Designated Location Aggregate Limit applies will reduce:
 - (a) The Total Aggregate Limit; and
 - **(b)** The Designated Location Aggregate Limit for the applicable "location".

Such payments will not reduce the General Aggregate Limit described in Paragraph 2.d. below, the Designated Project Aggregate Limit the Designated Location Aggregate Limit for any other "location".

- d. Subject to the Total Aggregate Limit described in Paragraph 2.a. above, the General Aggregate Limit shown in the Schedule - Limits Of Insurance And Designated Projects And Locations applies and is further subject to all of the following provisions:
 - (1) The General Aggregate Limit is the most we will pay for the sum of:
 - (a) Damages under Coverage A because of "bodily injury" and "property damage" caused by "occurrences", and medical expenses under Coverage C for "bodily injury" caused accidents, that cannot attributed only to operations at a single "project" or a single "location"; and
 - (b) Damages under Coverage B.
 - (2) The General Aggregate Limit does not apply to damages for "bodily injury" or "property damage" included in the "products-completed operhazard". ations Instead. the Products-Completed Operations Aggregate Limit described Paragraph 3. below applies to such damages.
 - (3) Any payments made for damages or medical expenses to which the

General Aggregate Limit applies will reduce:

- (a) The Total Aggregate Limit; and
- (b) The General Aggregate Limit.

Such payments will not reduce the Designated Project Aggregate Limit for any "project" or the Designated Location Aggregate Limit for any "location".

- 4. The following replaces Paragraph 3. of **SECTION III - LIMITS OF INSURANCE:**
 - 3. The Products-Completed Operations Aggregate Limit shown in the Declarations is the most we will pay under Coverage A for damages because of "bodily injury" or "property damage" included in the "productscompleted operations hazard". Any payments made for such damages will not reduce the Total Aggregate Limit, the General Aggregate Limit, the Designated Project Aggregate Limit for any "project" or the Designated Location Aggregate Limit for any "location".
- 5. The following is added to the **DEFINITIONS** Section:

"Location" means any designated location shown in the Schedule - Limits Of Insurance And Designated Projects and Locations that is owned by or rented to you. For the purposes of determining the applicable aggregate limit of insurance, each "location" that includes a premises involving the same or connecting lots, or premises whose connection is interrupted only by a street, roadway or waterway, or by a right-ofway of a railroad, will be considered a single "location".

"Project" means any designated project shown in the Schedule - Limits Of Insurance And Designated Projects And Locations that is away from premises owned by or rented to you and at which you are performing operations pursuant to a contract or agreement. For the purposes of determining the applicable aggregate limit of insurance, each "project" that includes a premises involving the same or connecting lots, or premises whose connection is interrupted only by a street, roadway or waterway, or by a right-ofway of a railroad, will be considered a single "project".

Insurance Coverage

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR **CONTRACTORS – SCHEDULED PERSON OR ORGANIZATION**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Names of Additional Insured Person(s) or Organization(s):

Any person or organization that you agree in a written contract to include as an additional insured on this Coverage Part, provided that such written contract was signed by you before, and is in effect when, the "bodily injury" or "property damage" occurs or the "personal injury" or "advertising injury" offense is committed

Location of Covered Operations:

Any project to which a written contract with the Additional Insured Person(s) or Organization(s) in the Schedule applies.

(Information required to complete this Schedule, if not shown above, will be shown in the Declarations.)

- A. Section II Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage", "personal injury" or "advertising injury" caused, in whole or in part, by:
 - 1. Your acts or omissions; or
 - 2. The acts or omissions of those acting on your

in the performance of your ongoing operations for the additional insured(s) at the location(s) designated above.

B. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to "bodily injury" or "property damage" occurring, or "personal injury" or "advertising injury" arising out of an offense committed, after:

- 1. All work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the additional insured(s) at the location of the covered operations has been completed: or
- 2. That portion of "your work" out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as a part of the same project.

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Insurance Coverage

DATE OF ISSUE: 07/02/2024 Page 1 of 1

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – COMPLETED OPERATIONS

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s):

Any person or organization that you agree in a written contract to include as an additional insured on this Coverage Part for "bodily injury" or "property damage" included in the products-completed operations hazard, provided that such contract was signed by you before, and is in effect when, the "bodily injury or "property damage" occurs.

Location And Description Of Completed Operations

Any project to which a written contract with the Additional Insured Person(s) or Organization(s) in the Schedule applies.

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

Section II – Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury" or "property damage" caused, in whole or in part, by "your work" at the

location designated and described in the schedule of this endorsement performed for that additional insured and included in the "products-completed operations hazard".

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City of Carmel-by-the-Sea | Objective Design and Development Standards Proposal

DATE OF ISSUE: 07/02/2024

COMMERCIAL GENERAL LIABILITY

c. Method Of Sharing

If all of the other insurance permits contribution by equal shares, we will follow this method also. Under this approach each insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first

If any of the other insurance does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers.

d. Primary And Non-Contributory Insurance If Required By Written Contract

If you specifically agree in a written contract or agreement that the insurance afforded to an insured under this Coverage Part must apply on a primary basis, or a primary and non-contributory basis, this insurance is primary to other insurance that is available to such insured which covers such insured as a named insured, and we will not share with that other insurance, provided that:

- (1) The "bodily injury" or "property damage" for which coverage is sought occurs; and
- (2) The "personal and advertising injury" for which coverage is sought is caused by an offense that is committed;

subsequent to the signing of that contract or agreement by you.

5. Premium Audit

- a. We will compute all premiums for this Coverage Part in accordance with our rules and rates.
- b. Premium shown in this Coverage Part as advance premium is a deposit premium only. At the close of each audit period we will compute the earned premium for that period and send notice to the first Named Insured. The due date for audit and retrospective premiums is the date shown as the due date on the bill. If the sum of the advance and audit premiums paid for the policy period is greater than the earned premium, we will return the excess to the first Named Insured.
- c. The first Named Insured must keep records of the information we need for premium computation, and send us copies at such times as we may request.

6. Representations

By accepting this policy, you agree:

- a. The statements in the Declarations are accurate and complete:
- b. Those statements are based upon representations you made to us; and
- c. We have issued this policy in reliance upon your representations.

The unintentional omission of, or unintentional error in, any information provided by you which we relied upon in issuing this policy will not prejudice your rights under this insurance. However, this provision does not affect our right to collect additional premium or to exercise our rights of cancellation or nonrenewal in accordance with applicable insurance laws or regulations.

→7. Separation Of Insureds

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this Coverage Part to the first Named Insured, this insurance applies:

- As if each Named Insured were the only Named Insured; and
- Separately to each insured against whom claim is made or "suit" is brought.

8. Transfer Of Rights Of Recovery Against Others To Us

If the insured has rights to recover all or part of any payment we have made under this Coverage Part, those rights are transferred to us. The insured must do nothing after loss to impair them. At our request, the insured will bring "suit" or transfer those rights to us and help us enforce them.

9. When We Do Not Renew

If we decide not to renew this Coverage Part, we will mail or deliver to the first Named Insured shown in the Declarations written notice of the nonrenewal not less than 30 days before the expiration date.

If notice is mailed, proof of mailing will be sufficient proof of notice.

SECTION V - DEFINITIONS

- "Advertisement" means a notice that is broadcast or published to the general public or specific market segments about your goods, products or services for the purpose of attracting customers or supporters. For the purposes of this definition:
 - Notices that are published include material placed on the Internet or on similar electronic means of communication; and
 - b. Regarding websites, only that part of a website that is about your goods, products or services for the purposes of attracting customers or supporters is considered an advertisement.

occupational therapist or occupational therapy assistant, physical therapist or speech-language pathologist; or

- (b) First aid or "Good Samaritan services" by any of your "employees" or "volunteer workers", other than an employed or volunteer doctor. Any such "employees" or "volunteer workers" providing or failing to provide first aid or "Good Samaritan services" during their work hours for you will be deemed to be acting within the scope of their employment by you or performing duties related to the conduct of your business.
- 3. The following replaces the last sentence of Paragraph 5. of SECTION III - LIMITS OF INSURANCE:

For the purposes of determining the applicable Each Occurrence Limit, all related acts or omissions committed in providing or failing to provide "incidental medical services", first aid or "Good Samaritan services" to any one person will be deemed to be one "occurrence".

4. The following exclusion is added to Paragraph 2., Exclusions, of SECTION I -COVERAGES - COVERAGE A - BODILY INJURY AND PROPERTY DAMAGE LIABILITY:

Sale Of Pharmaceuticals

"Bodily injury" or "property damage" arising out of the violation of a penal statute or ordinance relating to the sale of pharmaceuticals committed by, or with the knowledge or consent of the insured.

5. The following is added to the **DEFINITIONS** Section:

"Incidental medical services" means:

- a. Medical, surgical, dental, laboratory, xray or nursing service or treatment, advice or instruction, or the related furnishing of food or beverages; or
- **b.** The furnishing or dispensing of drugs or medical, dental, or surgical supplies or appliances.
- 6. The following is added to Paragraph 4.b., Excess Insurance, of SECTION IV -COMMERCIAL GENERAL LIABILITY CONDITIONS:

This insurance is excess over any valid and collectible other insurance, whether primary, excess, contingent or on any other basis,

that is available to any of your "employees" for "bodily injury" that arises out of providing or failing to provide "incidental medical services" to any person to the extent not subject to Paragraph 2.a.(1) of Section II -Who Is An Insured.

K. MEDICAL PAYMENTS - INCREASED LIMIT

The following replaces Paragraph **SECTION III – LIMITS OF INSURANCE:**

- 7. Subject to Paragraph 5. above, the Medical Expense Limit is the most we will pay under Coverage C for all medical expenses because of "bodily injury" sustained by any one person, and will be the higher of:
 - a. \$10,000; or
 - **b.** The amount shown in the Declarations of this Coverage Part for Medical Expense Limit.
- L. AMENDMENT OF EXCESS INSURANCE CONDITION - PROFESSIONAL LIABILITY

The following is added to Paragraph 4.b., Excess Insurance, of SECTION IV -COMMERCIAL **GENERAL** LIABILITY CONDITIONS:

This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis, that is Professional Liability or similar coverage, to the extent the loss is not subject to the professional services exclusion of Coverage A or Coverage B.

BLANKET WAIVER OF SUBROGATION -WHEN REQUIRED BY WRITTEN CONTRACT OR AGREEMENT

The following is added to Paragraph 8., Transfer Of Rights Of Recovery Against Others To Us, of SECTION IV - COMMERCIAL GENERAL LIABILITY CONDITIONS:

If the insured has agreed in a written contract or agreement to waive that insured's right of recovery against any person or organization, we waive our right of recovery against such person or organization, but only for payments we make because of:

- a. "Bodily injury" or "property damage" that occurs; or
- b. "Personal and advertising injury" caused by an offense that is committed;

subsequent to the signing of that contract or agreement.

Policy: BA0S474363 **COMMERCIAL AUTO**

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

BLANKET ADDITIONAL INSURED

This endorsement modifies insurance provided under the following:

BUSINESS AUTO COVERAGE FORM MOTOR CARRIER COVERAGE FORM

The following is added to Paragraph c. in A.1., Who Is An Insured, of SECTION II - COVERED AUTOS LIABILITY COVERAGE in the BUSINESS AUTO COVERAGE FORM and Paragraph e. in A.1., Who Is An Insured, of SECTION II - COVERED AUTOS LIABILITY COVERAGE in the MOTOR CARRIER COVERAGE FORM, whichever Coverage Form is part of your policy:

This includes any person or organization who you are required under a written contract or agreement

between you and that person or organization, that is signed by you before the "bodily injury" or "property damage" occurs and that is in effect during the policy period, to name as an additional insured for Covered Autos Liability Coverage, but only for damages to which this insurance applies and only to the extent of that person's or organization's liability for the conduct of another "insured".

Policy # BA0S474363 **COMMERCIAL AUTO**

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

BLANKET WAIVER OF SUBROGATION

This endorsement modifies insurance provided under the following:

AUTO DEALERS COVERAGE FORM **BUSINESS AUTO COVERAGE FORM** MOTOR CARRIER COVERAGE FORM

The following replaces Paragraph A.5., Transfer of Rights Of Recovery Against Others To Us, of the **CONDITIONS** Section:

5. Transfer Of Rights Of Recovery Against Others To Us

We waive any right of recovery we may have against any person or organization to the extent

required of you by a written contract executed prior to any "accident" or "loss", provided that the "accident" or "loss" arises out of the operations contemplated by such contract. The waiver applies only to the person or organization designated in such contract.



WORKERS COMPENSATION AND EMPLOYERS LIABILITY POLICY

ENDORSEMENT WC 99 03 76 (A) -

POLICY NUMBER: UB7J712856

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT – CALIFORNIA (BLANKET WAIVER)

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule.

The additional premium for this endorsement shall be mium.

% of the California workers' compensation pre-

Schedule

Person or Organization

Job Description

Any Person or organization for which the insured has agreed by written contract executed prior to loss to furnish this waiver.

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.

(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

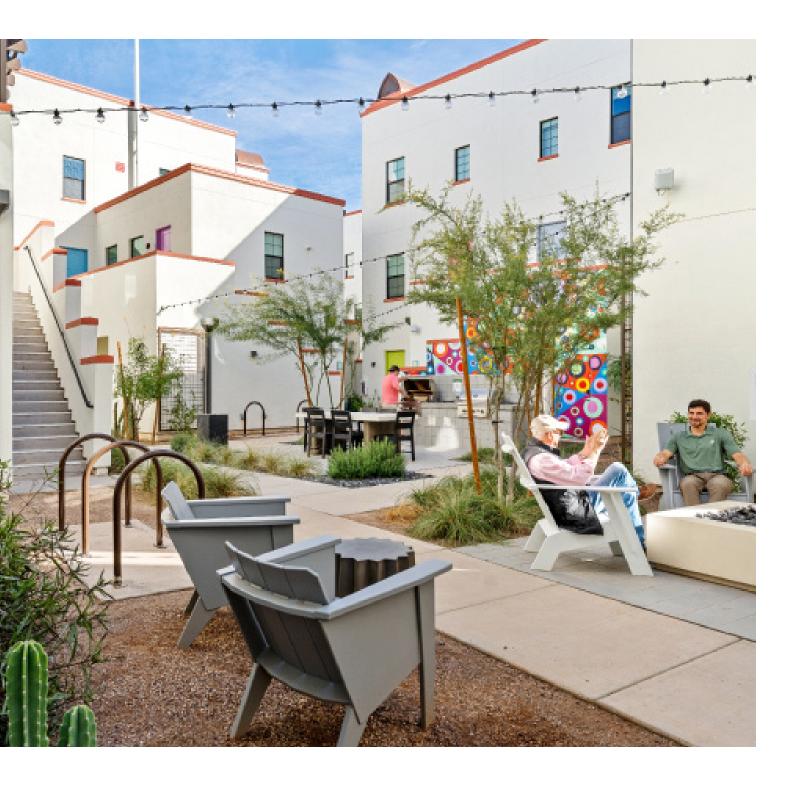
Insurance Company

Countersigned by _

Travelers Property Casualty Company of America

DATE OF ISSUE: 7/18/2024

Fee Schedule



Preliminary Fee Schedule

This section provides a description of the expected budget for the work described for **Objective Design Standards Consultant Services** in the RFP.

A summary cost table is included on the next page, providing totals by task as described in our detailed work plan. A detailed cost table with details of personnel hours can be provided upon request. Our "not-to-exceed" fixed fee for our base scope of work is \$90,000.

Additional Terms for Budget

- Budget does not include rental or purchasing fees for space or equipment for workshops, charrettes and other meetings. (Consultant to bring computers and drafting supplies.)
 Consultant will not be responsible for any such planning or expenses.
- 2. Budget does not include food for participants other than the design team for workshops, charrette and working sessions.
- 3. Budget does not include postage associated with public outreach and marketing.
- 4. Budget does not include installation of any and all public outreach media including but not limited to banners and signage.
- 5. In the interest of environmental considerations, the consultant will provide a PDF file of each deliverable unless otherwise specified.
- 6. Client shall be paid on a fee basis for performance of services under this agreement in accordance with the table above.

Any additional tasks performed outside of those specified above, such as attending additional meetings or completing additional revisions beyond the hours or number of revisions specified above, will be compensated at the hourly rates listed in the table above (subject to increase by five percent (5%) on January 1 of each calendar year occurring during the term of this agreement.)

Rates Schedule

Position at Opticos Design - 2025	Hourly Rate
Principal	\$350
Senior Associate	\$260
Associate II	\$235
Associate I	\$210
Senior Designer	\$195
Designer	\$185

Proposed Budget

PROPOS	SED WORK PLAN	FEES
Task 1	Project Startup & Management	\$20,510
1.1	Project Startup & Kickoff Meeting	\$2,350
1.2	Coordination calls with City (12)	\$9,240
1.3	Administration & Quality Control	\$8,920
Task 2	Targeted Community Engagement	\$22,045
2.1	Working Session #1: Key Projects & Outcomes	\$2,455
2.2	Local Industry Roundtable Meeting #1	\$3,810
2.3	Joint PC/CC Study Sessions (2)	\$5,430
2.4	Community Meetings (3)	\$10,350
Task 3	Research	\$21,280
3.1	Field Visit and Microscale Documentation	\$13,330
3.2	Review of Background Documents and Key Projects	\$5,730
3.3	Working Session #2: Findings and Recommendations	\$2,220
Task 4	Objective Design Standards	\$109,095
4.1	Outline for ODDS	\$2,990
4.2	Administrative Draft ODDS	\$57,330
4.3	Public Draft ODDS	\$26,640
4.4	Working Session #3: Public Draft ODDS	\$2,455
4.5	Final ODDS, as adopted	\$9,680
4.6	ODDS Checklist	\$10,000
Task 5	Public Meetings	\$5,220
5.1	Meeting Attendance & Support (2; in-person)	\$5,220
xpense	s	\$1,850
otal Ba	se Scope of Work (not including Optional Tasks)	\$180,000
Optiona	l Tasks	
2.2A	Local Industry Roundtable #2	\$4,000
4.2A	Additional Architectural Style (each)	\$15,000
4.2B	Site Test & Visualization (each)	\$10,000
4.2C	Project Review Testing (each)	\$5,000
4.2D	Screencheck Draft ODDS	\$15,000

Appendix



Detailed Work Plan

This section describes our proposed tasks to successfully complete the work defined in the RFP. For each task, we have identified deliverables and requests for City staff.

Task 1. Project Startup & Management

Opticos' project management is characterized by a highly collaborative approach founded on open communication and accessible project information. Working closely with you, we will manage the process and efficiently pivot as needed to accommodate change.

- **1.1 Project Startup & Kickoff Meeting.** Opticos will prepare for and facilitate a virtual meeting with City staff to kick off the project and confirm project goals, finalize schedules and deliverables, establish protocols for communication, share project information, and coordinate project tasks. This can be an opportunity to refine the scope, consider optional/additional tasks, and discuss outreach goals. The Kickoff Meeting and Working Session #1 (Task 2.1) will be the initial meetings with staff.
- **1.2 Coordination calls with City.** Opticos will establish a schedule for regular team check-in calls using video conference (biweekly and as needed, up to 12) with City staff. Agendas will be available beforehand, and meeting notes will be shared through a cloud file-sharing system.
- **1.3 Administration & Quality Control.** Opticos will manage the project to stay on schedule, within scope and budget, and maintain quality assurance. Meeting notes, including action items and deliverable dates, will be provided within the week of the meeting. Progress reports will be provided monthly, including a regularly updated project schedule and invoices.

Task 1 Deliverables

- Kickoff meeting agenda and meeting notes (PDF)
- Coordination meeting agenda and meeting notes (PDF)
- Monthly invoice, including progress report

Requests for City staff:

Support in scheduling kickoff meeting and recurring coordination meetings

Task 2. Targeted Community Engagement

Meaningful input from the community and decisionmakers throughout the project process is key to the success of the ODDS.

2.1 Working Session #1: Key Projects & Outcomes.

Opticos will facilitate a virtual 1.5-hour working session with City staff to hear about key projects and gain insight on what is seen as effective and what needs to be addressed for improvement. This can be in the standards for entire buildings or certain elements of a building.

2.2 Local Industry Roundtable Meeting #1. In

collaboration with City staff, Opticos will prepare for and facilitate a virtual roundtable meeting with local design and development industry professionals. This meeting will seek input and feedback from local designers, developers, builders, and realtors to share approach and receive feedback. We will engage the group in a discussion focusing on ideas for addressing the ODDS. We will also provide our experience to the group on the effectiveness of certain standards (e.g., daylight plane, upper story stepback, maximum building length, architectural style, etc.).

(Optional Task) 2.3 Local Design & Development Industry Roundtable Meeting #2. In coordination with City staff, the Opticos team will prepare for and facilitate a second virtual roundtable meeting with local design and development industry professionals. This meeting will seek input and feedback from local designers, developers, builders and realtors on the Draft ODDS.

2.3 Planning Commission Study Sessions (2). In coordination with City staff, the Opticos team will prepare for and facilitate two virtual study sessions with

the Planning Commission, scheduled at key project milestones.

2.4 Community Meeting. Two Opticos members will facilitate up to 3 in-person community meeting to present and receive feedback on key issues over the coure of this project We are open to your ideas on how to structure this meeting; initially, we propose these meetings as "Open House" format with a presentation and discussion portion at the beginning for attendees to ask questions, present ideas, and use in their review of the Open House materials posted on the walls of the venue. The first meeting, which is intended as an introduction to the project, is proposed to occur in parallel with the Field Visit included in Task 3.1

Task 2 Deliverables

 Engagement preparation and facilitation, including materials and summary notes for community meetings (PDF)

Requests for City staff:

Support in planning logistics and attendance at events by key City staff

Task 3. Research

The Opticos team will establish an understanding of Carmel-by-the-Sea from a physical and design perspective and a policy and regulatory perspective. This research will help in the targeted community engagement and in preparing the ODDS.

3.1 Field Visit and Microscale Documentation. Opticos will coordinate with City staff to prepare for and facilitate an in-person tour of key areas and projects. We will also prepare microscale documentation by measuring and photographing key and representative projects and design elements. This information will directly inform the new ODDS with Carmel's "DNA."

Opticos will identify the range of styles in Carmel-by-the-Sea and the prevalent style(s). We will prepare a diagram of sub-areas annotated with a range of styles, prevalent styles, and any character-defining architectural elements. We will use this information in the targeted community engagement to ask the following questions, among others:

• Which styles are preferred by the Community?

- Where does the Community think it important to regulate architectural style?
- Are there certain architectural elements, independent of style, that are preferred?

3.2 Review of Background Documents and Key Projects.

- 1. Background Documents. Opticos will review the General Plan's Land Use & Community Character Element and current Design Guidelines to understand the policy direction for what the objective design standards are to allow or require. We will also review the Local Coastal Plan and applicable chapters of the Carmel Municipal Code to identify how the ODDS can be incorporated without conflict.
- 2. Key Projects. Using the following questions, Opticos will review up to four representative sets of plans for accessory dwelling units, multi-family residential and mixed-use residential projects to gain insight and clarity of standards compared to outcomes:
- How are the current standards being interpreted and applied by project designers and developers?
- Are there gaps in what the standards intend versus what complies with them?

3.3 Working Session #2: Findings and

Recommendations. The Opticos team will facilitate a working session with City staff to discuss the findings and recommendations from Tasks 3.1 and 3.2

Task 3 Deliverables

- Summary of Task 3 Findings (Memo; up to 10 pages)
- Working Session agenda and notes (PDF)

Requests for City staff:

- Provide Opticos team with four projects that include key desired outcomes and outcomes to be avoided
- Timely response to data request

Task 4. Objective Standards

Using the results of targeted community engagement and direction from City staff, the Opticos team will work closely with City staff to prepare the ODDS.

4.1 Outline for ODDS. Opticos will prepare an outline to show the proposed content and organization..

4.2 Administrative Draft ODDS. Opticos will develop form-based ODDS, including diagrams and tables, that clearly communicate design intent and requirements for building and architectural design, and compatibility between new development and surrounding neighborhoods. The ODDS will include standards for up to **three architectural styles** consistent with the prevalent styles found from Task 3.1.

We will ensure that the document complies with applicable State laws and enables streamlined review by providing clear and measurable standards. The document will be designed to convey detailed information in a graphically rich, user-friendly format.

(Optional Task) 4.2A Additional Architectural Style.

Opticos will prepare standards for an architectural style in addition to the four provided in this proposed work plan. The additional style is assumed to be one that Opticos has previously regulated. If it is not one that we have previously regulated, we will need more information from the City to provide a fee estimate.

(Optional Task) 4.2B Site Test & Visualization. Using standards from the Administrative Draft ODDS, we will conduct tests on representative or opportunity sites for physical compatibility with the existing context. The test will be used to understand if the design outcomes indicate any gaps in the draft standards. This information will be used to refine the Public Draft ODDS.

Opticos will prepare up to two site visualizations for each site test. The visualizations will illustrate a typical level of information and detail as regulated by the Administrative Draft ODDS.

(Optional Task) 4.2C Project Review Testing. We will test project applications (recently approved or under review) using the Administrative Draft ODDS to gain insight into the project review process and to understand how those projects do or do not meet the draft standards. Findings from the project review testing will be used to refine the Public Draft ODDS.

(Optional Task) 4.2D Screencheck Draft ODDS. Opticos will prepare and submit to City staff for internal review

- a Screencheck Draft of the ODDS that addresses the comments received on the Administrative Draft ODDS
- **4.3 Public Draft ODDS.** Based on input and direction on Administrative Draft ODDS, Opticos will prepare and submit the Public Draft ODDS to the City for review and discussion at Planning Commission and City Council hearings and for distribution to the general public for review and comment.
- **4.4 Working Session #3: Public Draft ODDS.** Opticos will schedule a working session with City staff to discuss feedback on the Public Draft ODDS and confirm edits for the final ODDS.
- **4.5 Final ODDS, as adopted.** Upon adoption of the ODDS, Opticos will prepare final revisions to the ODDS to reflect the City Council's final actions.
- **4.6 ODDS Checklist.** Based on the Final ODDS, Opticos will prepare an automated checklist of the adopted ODDS. The checklist will be created to ensure that both applicants and staff can easily understand the requirements for projects eligible for ministerial approval under State law and the City Code.

Task 4 Deliverables

 Administrative Draft, Public Draft, and Final ODDS (IND & PDF file formats)

Requests for City staff:

• Timely review of drafts and consolidated comments

Task 5. Public Meetings

5.1 Meeting Attendance & Support (2). One member of the Opticos team will attend up to two public meetings during the ODDS adoption process. We will support City staff in preparing for the meetings and will make presentations at the meetings at the City's request.

Task 5 Deliverables

 Virtual attendance at public meetings (up to two total), including support to City staff in the preparation of materials and reports

Requests for City staff:

 Review and direction on draft staff reports for public hearings from the Opticos team This page was intentionally left blank.

We look forward to speaking with you.



Opticos Design, Inc.

2100 Milvia Street, Suite 125 Berkeley, California 94704 510.558.6957 info@opticosdesign.com



In 2007, Opticos became a founding B Corporation, establishing a triple bottom line of social, economic, and environmental responsibility.