

**AMENDMENT NO. 1 TO  
PROFESSIONAL SERVICES AGREEMENT  
FY2022/23 AS NEEDED PROFESSIONAL PERMIT TECHNICIAN SERVICES AND ON-CALL  
PLAN REVIEW SERVICES**

This is Amendment No. 1 (“Amendment No. 1”) to that certain Professional Services Agreement (“Agreement”) made on **September 14, 2022** between the City of Menifee (“City”) and **4LEAF, INC** (“Consultant”) for **FY2022/23 AS NEEDED PROFESSIONAL PERMIT TECHNICIAN SERVICES AND ON-CALL PLAN REVIEW SERVICES** which this Amendment No. 1 is made and entered into on \_\_\_\_\_, **2023** to increase the scope of work and compensation amount as indicated below:

1. Capitalized terms used but not defined in this Amendment No. 1 shall have the meanings ascribed to them in the Agreement.
2. **SECTION 2**, “Compensation” is amended to increase the maximum compensation by **SEVENTY-EIGHT THOUSAND, ONE-HUNDRED DOLLARS AND ZERO CENTS (\$78,100.00)**, and is amended to read as follows:

**SECTION 2. COMPENSATION.**

City hereby agrees to pay Consultant a sum not to exceed **(\$103,000.00) ONE-HUNDRED THREE THOUSAND DOLLARS AND ZERO CENTS**, notwithstanding any contrary indications that may be contained in Consultant's proposal, for the Services to be performed and reimbursable costs incurred under this Agreement. In the event of a conflict between this Agreement and Exhibit A, regarding the amount of compensation, this Agreement shall prevail. City shall pay Consultant for the Services rendered pursuant to this Agreement at the time and in the manner set forth herein. The payments specified below shall be the only payments from City to Consultant for the Services rendered pursuant to this Agreement. Consultant shall submit all invoices to City in the manner specified herein. Except as specifically authorized in advance by City, Consultant shall not bill City for duplicate services performed by more than one person.

3. Exhibit A, “Scope of Services” is supplemented to include the supplement attached as Exhibit A hereto. The supplement to the “Scope of Services” is not intended to replace the original Exhibit A to the Agreement, but instead to augment and increase the scope of work listed in the original Exhibit A to the Agreement. The initial paragraph of the original Exhibit A, “Scope of Services”, to the Agreement is amended to read as follows:

Consultant shall provide As Needed Professional Permit Technician Services and On-Call Plan Review Services in the amount not to exceed **(\$103,000.00) ONE-HUNDRED THREE THOUSAND DOLLARS AND ZERO CENTS** as further detailed in the following page(s).

4. All other terms and conditions of the Agreement remain in full force and effect.
5. This Amendment No. 1 may be executed in multiple counterparts, each of which shall be an original and all of which together shall constitute one agreement.

(Signatures on Following Page)

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PROFESSIONAL SERVICES AGREEMENT  
FY2022/23 AS NEEDED PROFESSIONAL PERMIT TECHNICIAN SERVICES AND ON-CALL  
PLAN REVIEW SERVICES

CITY OF MENIFEE

4LEAF, INC

\_\_\_\_\_  
Armando G. Villa, City Manager

\_\_\_\_\_  
Kevin Duggan, President/Secretary

Attest:

\_\_\_\_\_  
Gene Barry, Vice-President

\_\_\_\_\_  
Kay Vinson, City Clerk

Approved as to Form:

\_\_\_\_\_  
Jeffrey T. Melching, City Attorney

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## EXHIBIT A

### SCOPE OF SERVICES

Consultant shall provide As Needed Professional Permit Technician Services and On-Call Plan Review Services in the amount not to exceed **(\$103,000.00) ONE-HUNDRED THREE THOUSAND DOLLARS AND ZERO CENTS** as further detailed in the following page(s).

SUPPLEMENT TO SCOPE OF SERVICES

JULY 14, 2022

QUALIFICATIONS TO PROVIDE

ON-CALL PLAN REVIEW &  
BUILDING INSPECTION SERVICES

TO THE

CITY OF MENIFEE

SECTION 4

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SERVICE DELIVERY APPROACH



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## **SECTION 4: SERVICE DELIVERY APPROACH**

### **BUILDING PLAN REVIEW SERVICES**

4LEAF will provide Plan Review for any type of structure to ensure compliance with all adopted codes, local ordinances (including Tier 1 of Cal Green, if required) and State and federal laws that pertain to Building and Safety, and for compliance with the adopted International Code Council (ICC) Building, Plumbing, Electrical, Mechanical, National Fire Protection codes and standards, and the Accessibility and Noise and Energy Conservation requirements as mandated by the State of California Title 24, State of California Water Efficient Landscape Ordinance, the State of California Certified Access Specialist (CASP) compliance, and all other applicable ordinances. The types of projects we provide these services for include Single-Family Dwellings, large Multi-Family Mixed-Use Dwelling Units, Commercial, and Industrial.

### **Approach**

We understand that the specific building plan review responsibilities will include, but are not limited to:

- Examining plans, drawings, specifications, computations documents, soils reports, and additional data;
- Ascertaining whether projects are in accordance with applicable building and fire codes, and City ordinances, including but not limited to Title 24 and Title 25;
- Performing such reviews as structural, MEP, green building, fire and life safety, grading and drainage;
- Reviewing plans to ensure conformity to the required strengths, stresses, strains, loads, and stability as per the applicable laws;
- Reviewing plans to ensure conformity with use and occupancy classification, general building heights and areas, types of construction, fire resistance construction and protection systems, means of egress, accessibility, structural design, soils and foundations; and masonry;
- Providing additional plan review services as requested by the City;
- Conducting all plan review at the City Department or at a site mutually agreed upon in writing and;
- Supplying all plan review staff with all code books and other basic professional references.

### **On- and Off-Site Review**

4LEAF can supply Registered Professional Engineers to the City to work on-site performing structural plan review and non-structural reviews at the jurisdiction's discretion. Our experience includes checking for compliance with the structural, life-safety, accessibility, plumbing, mechanical, electrical, fire, and local codes/ordinances.

### **Process Mapping**

4LEAF aims to bring departmental processes together by identifying and eliminating obstacles to streamline processes. Our subject-matter experts visit each department within a jurisdiction to conduct an analysis of existing processes, identify how best to streamline separate departmental processes to improve workflow, and provide guidance and recommendations on an improved work plan.

4LEAF implementation staff work both on- and off-site during this process and offer extensive training to existing municipal staff members on the use of a jurisdiction's preferred permitting software. **We have a robust amount of experience with software that aids in the implementation of process mapping, such as Camino, File Maker Pro, OpenGov, e-PlanSoft, TRAKiT, EnerGov, Accela, and iWorQ.**



## **Plan Review QA/AC Review Process**

### **Task 1 – Project Tracking Set-up**

The first step of our process will be to set up the project in our system to enable 4LEAF and the City of Menifee each to track the progress of the review. Our plan tracking procedures are designed to track each submittal throughout the review process and maintain accurate and comprehensive records for each submittal.

### **Task 2 - Complete Submittal Review**

Upon receiving the plans from the City, 4LEAF will triage (preliminary plan review performed by 4LEAF plan review project lead) the submittal to verify that the submittal received is complete (i.e., all pertinent plans, calculations, reports, and other related documents) in order that we can begin our review. If the submitted package is incomplete, we will communicate with the City to discuss the deficient documents needed to proceed with our review.

### **Task 3 - Plan Review Assignment**

After the triage process is performed and a complete package is verified, the project will be assigned to the most qualified Plans Examiner and a turnaround time will be established. We will log each application into our database the same day the plans are received to assure that they are routed in a timely manner and to allow for daily project tracking.

### **Task 4 - Plan Review**

4LEAF will provide the project contact (Developer, Contractor, Architect, or Engineer) desired by the City of Menifee with a list of any items needing correction and clarification to comply with applicable building codes, ordinances, and regulations. A correction list will be created based on the missing codes and ordinances.

### **Task 5 - Quality Control**

Prior to submitting the plan review correction list to the City, the designated plan review project lead will review the correction list for adherence to applicable codes and ordinances as well as for accuracy and completeness. After completion of our quality control review a correction list will be e-mailed to a designated staff member at the City of Menifee or as directed by the City. The correction list and a 4LEAF transmittal form will include the following information: a description of the work, type of construction, occupancy group, square footage, number of floors, and sprinkler requirements.

### **Task 6 - Plan Review Rechecks**

Plans received for rechecks will be reviewed for conformance. Our goal is to actively work with the designers to resolve all unresolved issues after our second review. If it appears that there are complicated issues that might cause a project to go beyond our second review, we will communicate directly with the designer to resolve these concerns.

### **Task 7 - Project Approval**

Once the final plan reviews are completed and ready for approval, 4LEAF will organize the plans and supporting documents per the City of Menifee processing requirements and return them to the City, along with our letter of completion.

**Turn-Around Times**

4LEAF has a tremendous reputation for completing projects on-time and under budget. 4LEAF’s plan review team is widely recognized for quick turn-around times and prompt service. Off-site plan reviews are performed at our office, with plans transmitted by personal delivery or overnight service. The standard turn-around time is within 10 business days for residential plan reviews and within 10 days for commercial/industrial plan reviews; however, these timeframes are negotiable based on your needs. **4LEAF also provides Fire Plan Review services.**

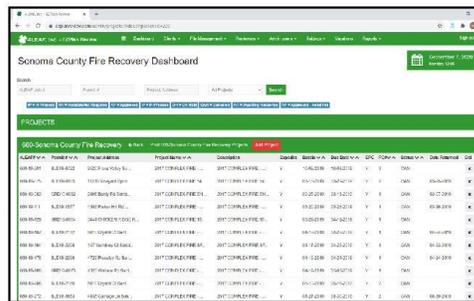
Type of Plans	Transportation	Initial Review	Resubmittal Review	Resubmittal Review #2	Expedited Review	Expedited Resubmittal
*Residential	< 24 Hours (pick up & delivery)	< 10 Days	< 5 Days	< 5 Days	< 5 Days	< 3 Days
**Multi-Family	< 24 Hours (pick up & delivery)	< 10 Days	< 5 Days	< 5 Days	< 5 Days	< 3 Days
Commercial	< 24 Hours (pick up & delivery)	< 10 Days	< 5 Days	< 5 Days	< 5 Days	< 3 Days
***Large Commercial > 15,000 s.f.	< 24 Hours (pick up & delivery)	Negotiable	Negotiable	Negotiable	Negotiable	Negotiable

**\*Larger complex plan reviews can be negotiated to achieve the best possible pricing. 4LEAF has a proven track record of working with municipalities to provide expedited reviews with special discounted pricing.**

Pick-up of all plans will be performed by 4LEAF staff within 24 hours of the City’s phone call or e-mail. 4LEAF prefers to pick-up and deliver the plans in person to communicate information that may be pertinent to the project and maintain consistent communication. At no additional cost, 4LEAF staff will transport the plans to and from the City upon a phone call to the 4LEAF office or simply e-mail for “pick-up” to [pickupsocal@4leafinc.com](mailto:pickupsocal@4leafinc.com).

**4LEAF’s EZPlan Review**

EZPlan Review is our in-house tracking software that acts as a communication tool between 4LEAF and the jurisdictions we work with. The use of EZPlan makes communication easy. This web portal allows users visualize project due dates, notes, and status updates so that projects can be followed from start to finish. Additionally, 4LEAF provides electronically stamped and uploaded copies of approved project plans, a value which saves clients time and resources. With the use of EZPlan, 4LEAF hopes to provide a level of ease and transparency during the off-site plan review process.

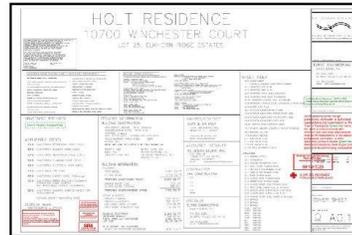


**Document Control**

When plans and documents are received for review, 4LEAF’s Plan Review Manager and Document Control Technician analyze the project, creates a job number, and completes a Job Setup Sheet. This form highlights both the jurisdiction, applicable contact information, and all project specific design criteria and notes. Jobs are

then transmitted through 4LEAF’s easily accessed EZPlan Review Portal which tracks initial and subsequent reviews and is open for view by the client. The City and their customers can view 4LEAF’s plan review control log through 4LEAF’s EZPlan Review Portal.

Plans then get distributed for review to a 4LEAF team consisting of Plan Review Engineers, Architect (a licensed state professional) and/or an ICC Certified Plans Examiner, as applicable. Our staff then performs his or her function of analyzing the plans and documentation for effective conformance to the state codes, referenced construction standards, and City amendments. 4LEAF’s code review methodology is “The Effective Use of the Codes” reinforced through proprietary and jurisdictional checklists. When complete, the Plan Review Manager overviews the project for quality control purposes and forwards comments or approvals to the client’s pre-designated contacts.



**Off-Site Electronic Plan Review**

Digital plan review allows 4LEAF the ability to review, markup and transport plans of any size electronically. We strongly encourage this service for our clients. This process delivers a high degree of cost effectiveness, time efficiency and a “green” and environmentally friendly system. Through our strong focus on utilizing this digital capability, we offer full access to all 4LEAF engineers and plans examiners company-wide, from any of our office locations. A protected online portal will be established to allow property owners, contractors, developers, businesses, designers, and stakeholders to submit plans electronically for review. Access to the online portal will be given to City staff for immediate access to information regarding project status during the review process.

4LEAF has successfully implemented and used Bluebeam for electronic review of files to help eliminate the use of paper and take the plan review workflow to a whole new level. 4LEAF’s offices are equipped with large scale monitors for easy review of plans. Bluebeam Revu combines powerful PDF editing, markup, and collaboration technology with reliable file creation. Bluebeam integrates flawlessly with our Green Line approach for electronic and timely turnarounds resulting in permit issuance within 5-7 business days.

**Additional Technologies**

Having served more than 350 jurisdictions, 4LEAF and our staff are knowledgeable and have experience working with a variety of different technologies for Electronic Plan Review, Permit Tracking, and Building Inspections. 4LEAF’s experience with tracking technologies includes, but is not limited to:



**Structural Only Review**

Upon request, 4LEAF will perform “structural only” reviews for the City. 4LEAF can communicate directly with the designers via email, in-person meetings, and through our EZPlan Review system. 4LEAF prefers PDF files for “structural only” reviews as they allow several Structural Engineers to review plans together should there be design-related questions. The majority of 4LEAF’s plan review engineers have a design background and work well with project designers.

## HOURLY RATES

Please state the firm fixed hourly rates and list the position title for each project team member. The hourly rates shall be firm for the base term of the contract effective thru June 30, 2023. Rates shall be fully burdened and include all labor, taxes, profit, general & administrative expenses, overhead, and insurance incurred by the Consultant. The below rates will apply to all Tasks, additional supplemental services or for updates outside of the existing Scope of Work.

TITLE	HOURLY RATE (\$)				
	YEAR 1 Thru 6/30/2023	YEAR 2 (2023/24)	YEAR 3 (2024/25)	YEAR 4 (2025/26)	YEAR 5 (2026/27)
Permit/Counter Manager	\$99	\$102	\$105	\$108	\$111
Senior Permit Technician	\$80	\$82	\$84	\$87	\$90
Permit Technician	\$70	\$72	\$74	\$76	\$78
Administrative Support	\$60	\$62	\$64	\$66	\$68
Chief Building Official	\$150	\$155	\$160	\$165	\$170
Building Inspector III	\$119	\$123	\$127	\$131	\$135
Building Inspector II	\$105	\$108	\$111	\$114	\$117
Building Inspector I	\$95	\$98	\$101	\$104	\$107
Civil Plan Review	\$145	\$149	\$153	\$158	\$163
Structural Plan Review Eng.	\$145	\$149	\$153	\$158	\$163
Non. Struct. Plan Review	\$120	\$124	\$128	\$132	\$136
Fire Prevention Officer	\$145	\$149	\$153	\$158	\$163
Fire Protection Engineer	\$175	\$180	\$180	\$191	\$197
Fire Plans Examiner	\$130	\$134	\$138	\$142	\$146
Fire Inspector II	\$125	\$129	\$133	\$137	\$141
Fire Inspector I	\$110	\$113	\$116	\$119	\$123
Inspector of Record	\$135	\$139	\$143	\$147	\$151
OSHPD Inspection/Review	\$140	\$144	\$148	\$152	\$157
CASp	\$155	\$160	\$165	\$170	\$175
Project Manager	\$160	\$165	\$170	\$175	\$180
Director	\$170	\$175	\$180	\$185	\$191
Principal-in-Charge	\$185	\$191	\$197	\$203	\$209

*\*Additional hourly rates and 4LEAF's Basis of Charges can be found on the following pages.*

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**FEE SCHEDULE**

**2022-2023 FEE SCHEDULE & BASIS OF CHARGES**

**For the City of Menifee  
 All Rates are Subject to Basis of Charges**

<b>PLAN REVIEW COST STRUCTURE</b>	<b>NOTES</b>
<b>Plan Review Percentage: 65%</b> <i>(Inclusive of all disciplines except Fire and Civil, which are billed on an hourly basis.)</i> <b>Hourly Plan Review: \$120 Non-Structural Review</b> <b>\$145 Structural Review</b>	<b>Fee includes:</b> <ul style="list-style-type: none"> <li>➤ Initial review and two (2) rechecks. Hourly charges apply after three (3) or more rechecks.</li> <li>➤ Shipping, courier, and electronic service.</li> </ul>

**Building & Fire**

Permit/Counter Manager .....	\$99/hour
Senior Permit Technician.....	\$80/hour
Permit Technician .....	\$70/hour
Administrative Support .....	\$60/hour
Chief Building Official .....	\$150/hour
Senior Combination Building Inspector (Building Inspector III) .....	\$119/hour
Commercial Building Inspector (Building Inspector II) .....	\$105/hour
Residential Building Inspector (Building Inspector I).....	\$95/hour
Civil Plan Review .....	\$145/hour
Structural Plan Review Engineer .....	\$145/hour
Non-Structural Plans Examiner .....	\$120/hour
Fire Prevention Officer .....	\$145/hour
Fire Protection Engineer (FPE).....	\$175/hour
Fire Plans Examiner .....	\$130/hour
Fire Inspector II.....	\$125/hour
Fire Inspector I.....	\$110/hour
Inspector of Record .....	\$135/hour
OSHPD Inspection/Review .....	\$140/hour
Certified Access Specialist (CASp) Inspection/Review.....	\$155/hour
GoFormz Software.....	\$50/user monthly
Hourly overtime charge per inspector .....	1.5 x hourly rate
Mileage (for inspections performed within the City).....	IRS Rate + 20%

**Project Management**

Project Manager .....	\$160/hour
Director.....	\$170/hour
Principal-in-charge.....	\$185/hour



**Code Enforcement**

Project Manager .....	\$160/hour
Director of Code Enforcement .....	\$150/hour
Senior Code Enforcement Officer.....	\$110/hour
Code Enforcement Officer.....	\$95/hour

**Planning**

Principal-in-Charge .....	\$250/hour
Housing Policy Director .....	\$225/hour
Planning Director .....	\$205/hour
Principal/Planning Manager .....	\$175/hour
Senior Planner .....	\$150/hour
Associate Planner .....	\$135hour
Assistant Planner .....	\$115/hour
Planning Technician.....	\$99/hour

Rates will be communicated with City Management at time of request and will vary based on the qualifications and experience of the personnel.