

**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)

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

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

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

SERVICE DELIVERY APPROACH



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.



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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.

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.

| Project Name | Status | Due Date | Notes |
|---------------------------------|-------------|------------|--|
| 000-Sonoma County Fire Recovery | Completed | 2022-03-15 | Project completed successfully. |
| 001-Sonoma County Fire Recovery | In Progress | 2022-03-20 | Review in progress. |
| 002-Sonoma County Fire Recovery | Pending | 2022-03-25 | Awaiting client input. |
| 003-Sonoma County Fire Recovery | On Hold | 2022-04-01 | Project on hold due to funding issues. |
| 004-Sonoma County Fire Recovery | Cancelled | 2022-04-05 | Project cancelled due to lack of interest. |

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

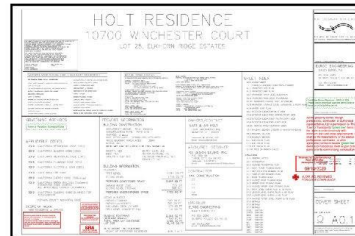


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then transmitted through 4LEAF's easily accessed EZPlan Review Portal which tracks initial and subsequent reviews and is open for view by the client. The City and their customers can view 4LEAF's plan review control log through 4LEAF's EZPlan Review 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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2022-2023 FEE SCHEDULE & BASIS OF CHARGES

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

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 |

Qualifications to Provide Plan Review and Inspection Services to the City of Menifee
Fee Schedule

July 13, 2022



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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.