

City Council Chambers  
29844 Haun Road  
Menifee, CA 92586



Menifee City Council  
Regular Meeting Agenda

Wednesday, August 7, 2024  
5:00 PM Closed Session  
6:00 PM Regular Meeting

Bill Zimmerman, Mayor  
Bob Karwin, District 1  
Ricky Estrada, District 2  
Lesa Sobek, District 3  
Dean Deines, District 4

Armando G. Villa, City Manager  
Jeffrey T. Melching, City Attorney  
Sarah Manwaring, City Clerk

## AGENDA

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- 10.9 Bid Award and Agreement with Hunden Partners for Placemaking, Identity, and Tourism Master Plan Consulting Services

### RECOMMENDED ACTION

1. Award bid and authorize the City Manager to execute a Professional Services Agreement with Hunden Partners for consulting services for the Placemaking, Identity, and Tourism Master Plan, in a total not-to-exceed amount of \$125,000 through June 30, 2025.



## **CITY OF MENIFEE**

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SUBJECT: Bid Award and Agreement with Hunden Partners for Placemaking, Identity, and Tourism Master Plan Consulting Services

MEETING DATE: August 7, 2024

TO: Mayor and City Council

PREPARED BY: Kayla Charters, Acting Economic Development Manager

REVIEWED BY: Bryan Jones, Assistant City Manager

APPROVED BY: Armando G. Villa, City Manager

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### **RECOMMENDED ACTION**

1. Award bid and authorize the City Manager to execute a Professional Services Agreement with Hunden Partners for consulting services for the Placemaking, Identity, and Tourism Master Plan, in a total not-to-exceed amount of \$125,000 through June 30, 2025.

### **DISCUSSION**

As a new city, Menifee faces the challenge of developing a distinct sense of place that leverages the community's historic and scenic assets and makes the City a highly attractive and desired destination for residents, businesses, and visitors. With this in mind, the City Council established the development of Menifee's unique identity as one of five strategic priorities identified within the Strategic Plan. The Strategic Plan objectives associated with the development of Menifee's unique identity are detailed as follows:

- *Objective A:* Conduct a place-making and tourism feasibility study as part of developing Menifee as a destination City.
- *Objective B:* Conduct a regional events assessment to identify a signature event that will help make Menifee a destination City.

To address these objectives, staff began the process of soliciting proposals from qualified consultants to facilitate the development of a Placemaking, Identity, and Tourism Master Plan. With only one proposal received by the December 15, 2023, deadline following the issuance of a Request for Proposals (RFP), the original RFP issuance was canceled. Staff then analyzed the feedback that was provided by the potential firms, which requested more information regarding the budget for the project. Staff revised the scope of work to include budget information and

additional details to encourage additional proposal responses. A new RFP was released on April 10, 2024, and the City received seven proposal responses. A review committee comprised of city staff from multiple departments completed a comprehensive evaluation of the proposals received. Proposals were reviewed and ranked based on the qualifications and experience of the firms and their project team, service delivery approach, and cost. The average scores for the RFP evaluation summary are shown in Table 1.

**TABLE 1 – RFP EVALUATION SUMMARY**

Firm	RFP Evaluation Score
Destination by Design	73.75
Future IQ	74.25
Hunden Partners	82.75
JLL	77.50
PSM	66.25
RGS	77.75
Think Place Agency	77.25

Following the initial evaluation process, staff determined that an interview phase would be needed to make a final decision. The top four bidders with the highest bid evaluation scores were then interviewed and evaluated. The scores and cost proposals are outlined in Table 2 below. Hunden Partners was the highest scoring during this phase and was ultimately selected for the project. The total cost for the professional services with Hunden Partners is \$125,000.

**TABLE 2 – RFP INTERVIEW SUMMARY**

Firm	Interview Evaluation Score	Cost Proposal
<b>Hunden Partners</b>	<b>76.25</b>	<b>\$125,000</b>
JLL	61.75	\$131,250
RGS	51.75	\$124,384
Think Place Agency	73.25	\$139,820

Hunden Partners provided a proposal that was rooted in data-driven research and stakeholder community member input that focused on destination assessment, product retention, expansion, attraction and development, and prioritization of efforts that would best support the growth and competitiveness of the City’s tourism economy. Hunden Partners detailed eight tasks to achieve the Placemaking Plan including:

- Task 1 – Kickoff and Discovery
- Task 2 – Creation of Webpage and Resident Sentiment Survey
- Task 3 – Public and Stakeholder Engagement
- Task 4 – Menifee Destination Overview
- Task 5 – Economic and Demographic Analysis
- Task 6 – Destination Product/Signature Events/Asset Opportunity Analysis

- Task 7 – Product Investment and Signature Events Recommendations
- Task 8 – Creation of Final Placemaking Plan

The amount of the proposed Professional Services Agreement exceeds the City Manager's signing authority. Pursuant to Menifee Municipal Code §3.12.040, any contract amount that exceeds the City Manager's signing authority shall be approved by the City Council.

### **STRATEGIC PLAN OBJECTIVE**

Unique Identity: Through the creation of this Placemaking, Identity, and Tourism Master Plan, the City would achieve Objectives A & B under Strategic Priority and Goal of Unique Identity.

### **FISCAL IMPACT**

The fiscal impact of the proposed agreement with Hunden Partners is not-to-exceed \$125,000. Funding for the proposed agreement with Hunden Partners is available within the Fiscal Year 2024/2025 Budget under One-Time Consulting Services within the General Fund, Economic Development Department (1100-50-ECD-652855). No additional budget appropriation action is required.

### **ATTACHMENTS**

1. Agreement - Hunden Partners

**CITY OF MENIFEE**

**PROFESSIONAL SERVICES AGREEMENT**

**PLACEMAKING, IDENTITY, & TOURISM MASTER PLAN**

THIS PROFESSIONAL SERVICES AGREEMENT (“Agreement”) is made and effective this \_\_\_\_\_ day of \_\_\_\_\_, 2024 (“Effective Date”) by and between the CITY OF MENIFEE, a California municipal corporation, (“City”) and **HUNDEN PARTNERS**, a California Corporation (“Consultant”). City and Consultant may sometimes herein be referred to individually as a “Party” and collectively as the “Parties.”

**SECTION 1. SERVICES.**

Subject to the terms and conditions set forth in this Agreement, Consultant shall provide to City the services described in the Scope of Services, attached hereto as Exhibit A and incorporated herein by this reference (the “Services”). Consultant will perform subsequent task orders as requested by the Contract Administrator (as defined below), in accordance with the Scope of Services. In the event of a conflict in or inconsistency between the terms of this Agreement and Exhibit A, this Agreement shall prevail.

1.1 Term of Services. The term of this Agreement shall begin on **August 7, 2024** and shall end on **June 30, 2025** unless the term of this Agreement is otherwise terminated or extended as provided for in Section 8. The time provided to Consultant to complete the Services required by this Agreement shall not affect City’s right to terminate this Agreement, as provided for in Section 8.

1.2 Standard of Performance. Consultant represents and warrants that Consultant is a provider of first class work and services and Consultant is experienced in performing the Services contemplated herein and, in light of such status and experience, Consultant shall perform the Services required pursuant to this Agreement in the manner and according to the standards observed by a competent practitioner of the profession in which Consultant is engaged in the geographical area in which Consultant practices its profession and to the sole satisfaction of the Contract Administrator.

1.3 Assignment of Personnel. Consultant shall assign only competent personnel to perform the Services pursuant to Agreement. In the event that City, in its sole discretion, at any time during the term of this Agreement, desires the reassignment of any such persons, Consultant shall, immediately upon receiving notice from City of such desire of City, reassign such person or persons.

1.4 Time. Consultant shall devote such time to the performance of the Services pursuant to this Agreement as may be reasonably necessary to satisfy Consultant’s obligations hereunder.

1.5 Authorization to Perform Services. Consultant is not authorized to perform any of the Services or incur any costs whatsoever under the terms of this Agreement until receipt of authorization from the Contract Administrator.

1.6 Warranty. By executing this Agreement, Consultant warrants that Consultant (i) has thoroughly investigated and considered the Services, (ii) has carefully considered how the Services should be performed, and (iii) fully understands the facilities, difficulties, and restrictions attending performance of the Services.

1.7 Covid-19 Safety. If Consultant enters City property or meets in person with City employees during the performance of the Services, Consultant shall comply with all applicable emergency orders, directives, protocols, and best practices related to the COVID-19 pandemic, including, but not limited to: (A) wearing facial coverings, (B) maintaining adequate physical distancing when possible, (C) regular hand washing, and (D) regular hand sanitizing.

## **SECTION 2. COMPENSATION.**

City hereby agrees to pay Consultant a sum not to exceed **One Hundred Twenty Five Thousand Dollars and Zero Cents (\$125,000.00)** 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. The \$125,000 sum includes all research, travel, and related expenses for up to two (2) trips to Menifee throughout the study process. Any additional trips will be billed at \$1,400 per-person per-day. Any such additional trips over the two (2) included will require a written amendment to this Agreement, as provided for herein. 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.

2.1 Invoices. Consultant shall submit invoices during the term of this Agreement, based on the following billing schedule, broken down by deliverable milestone:

- |    |   |          |
|----|---|----------|
| a. | Kickoff to begin Study:   | \$18,500 |
| b. | Delivery of revised work plan, draft webpage, and draft survey: | \$26,000 |
| c. | Delivery of findings and recommendations presentation:          | \$48,000 |
| d. | Delivery of Draft Master Plan:                                  | \$20,000 |
| e. | Delivery of Final Master Plan:                                  | \$12,500 |

2.2 Invoices shall contain the following information:

- a. Serial identifications of progress bills; i.e., Progress Bill No. 1 for the first invoice, etc.;
- b. The beginning and ending dates of the billing period;

- c. A “Task Summary” containing the original contract amount, the amount of prior billings, the total due this period, the balance available under this Agreement, and the percentage of completion;
- d. Receipts for expenses to be reimbursed;
- e. The Consultant Representative’s signature.

Invoices shall be submitted to:

City of Menifee  
Attn: Accounts Payable  
29844 Haun Road  
Menifee, CA 92586

2.3 Payment Terms. City shall have thirty (30) days from the receipt of an invoice that complies with all of the requirements above to pay Consultant.

2.4 Retention of Funds, Final Payment. Consultant hereby authorizes City to retain and deduct from any amount payable to Consultant not exceeding five percent (5%) of the total compensation. The retained funds shall be paid to Consultant within sixty (60) days after final acceptance of the Services by the City and after Consultant has furnished City with full release of all undisputed payments under this Agreement. In the event there are any claims specifically excluded by Consultant from the operation of the release, City may retain proceeds of up to one hundred fifty percent (150%) of the amount in dispute. The failure of City to exercise such right to deduct or to withhold shall not, however, affect the obligations of Consultant to insure, indemnify, and protect City as provided in this Agreement. City shall pay the last five percent (5%) of the total amount due pursuant to this Agreement within sixty (60) days after completion of the Services and submittal to City of a final invoice, if all of the Services required have been satisfactorily performed. The City will not unreasonably withhold payment for Hunden’s reasonable best efforts to complete the Services satisfactorily.

2.5 Total Payment. City shall not pay any additional sum for any expense or cost whatsoever incurred by Consultant in rendering the Services pursuant to this Agreement. City shall make no payment for any extra, further, or additional service pursuant to this Agreement.

In no event shall Consultant submit any invoice for an amount in excess of the maximum amount of compensation provided above either for a task or for the entirety of the Services performed pursuant to this Agreement, unless this Agreement is modified in writing prior to the submission of such an invoice.

2.6 Hourly Fees. Fees for the Services performed by Consultant on an hourly basis shall not exceed the amounts shown on the fee schedule included with Exhibit A.

2.7 Reimbursable Expenses. Reimbursable expenses are included within the maximum amount of this Agreement.

2.8 Payment of Taxes. Consultant is solely responsible for the payment of employment taxes incurred under this Agreement and any federal or state taxes.

2.9 Payment upon Termination. In the event that City or Consultant terminates this Agreement pursuant to Section 8, City shall compensate Consultant for all outstanding costs and reimbursable expenses incurred for Services satisfactorily completed and for reimbursable expenses as of the date of written notice of termination. Consultant shall maintain adequate logs and timesheets in order to verify costs and reimbursable expenses incurred to that date.

### **SECTION 3. FACILITIES AND EQUIPMENT.**

Except as otherwise provided, Consultant shall, at its sole cost and expense, provide all facilities and equipment necessary to perform the services required by this Agreement. City shall make available to Consultant only physical facilities such as desks, filing cabinets, and conference space, as may be reasonably necessary for Consultant's use while consulting with City employees and reviewing records and the information in possession of City. The location, quantity, and time of furnishing those facilities shall be in the sole discretion of City. In no event shall City be required to furnish any facility or equipment that may involve incurring any direct expense, including but not limited to computer, long-distance telephone or other communication charges, vehicles, and reproduction facilities.

### **SECTION 4. INSURANCE REQUIREMENTS.**

Before beginning any work under this Agreement, Consultant, at its own cost and expense, shall procure the types and amounts of insurance listed below and provide certificates of insurance, indicating that Consultant has obtained or currently maintains insurance that meets the requirements of this Section and which is satisfactory, in all respects, to City. Consultant shall maintain the insurance policies required by this Section throughout the term of this Agreement. The cost of such insurance shall be included in Consultant's compensation. Consultant shall not allow any subcontractor, consultant or other agent to commence work on any subcontract until Consultant has obtained all insurance required herein for the subcontractor(s) and provided evidence thereof to City. Verification of the required insurance shall be submitted and made part of this Agreement prior to execution. Consultant acknowledges the insurance policy must cover inter-insured suits between City and other insureds. Consultant agrees that the requirement to provide insurance shall not be construed as limiting in any way the extent to which Consultant may be held responsible for the payment of damages to any persons or property resulting from Consultant activities or the activities of any person or persons for which Consultant is otherwise responsible nor shall it limit Consultant's indemnification liabilities as provided in Section 5.

4.1 Workers' Compensation. Consultant shall, at its sole cost and expense, maintain Statutory Workers' Compensation Insurance and Employer's Liability Insurance for any and all persons employed directly or indirectly by Consultant pursuant to the provisions of the California Labor Code. Statutory Workers' Compensation Insurance and Employer's Liability Insurance shall be provided with limits of not less than ONE MILLION DOLLARS (\$1,000,000.00) per accident, ONE MILLION DOLLARS (\$1,000,000.00) disease per employee, and ONE MILLION DOLLARS (\$1,000,000.00) disease per policy. In the alternative, Consultant may rely on a self-insurance program to meet those requirements, but only if the program of self-insurance complies

fully with the provisions of the California Labor Code. Determination of whether a self-insurance program meets the standards of the California Labor Code shall be solely in the discretion of the Contract Administrator. The insurer, if insurance is provided, or Consultant, if a program of self-insurance is provided, shall waive all rights of subrogation against City and its officers, officials, employees, and authorized volunteers for loss arising from the Services performed under this Agreement.

#### 4.2 Commercial General and Automobile Liability Insurance.

a. General requirements. Consultant, at its own cost and expense, shall maintain commercial general and automobile liability insurance for the term of this Agreement in an amount not less than ONE MILLION DOLLARS (\$1,000,000.00) per occurrence, combined single limit coverage, for risks associated with the Services contemplated by this Agreement, TWO MILLION DOLLARS (\$2,000,000.00) general aggregate, and TWO MILLION DOLLARS (\$2,000,000.00) products/completed operations aggregate. If a Commercial General Liability Insurance or an Automobile Liability Insurance form or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the Services to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit. Such coverage shall include but shall not be limited to, protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from the Services contemplated under this Agreement, including the use of hired, owned, and non-owned automobiles.

b. Minimum Scope of Coverage. Commercial general coverage shall be at least as broad as Insurance Services Office Commercial General Liability occurrence form CG 0001. Automobile coverage shall be at least as broad as Insurance Services Office Automobile Liability form CA 0001 Code 2, 8, and 9. No endorsement shall be attached limiting the coverage.

c. Additional Requirements. Each of the following shall be included in the insurance coverage or added as a certified endorsement to the policy:

(i) The insurance shall cover on an occurrence or an accident basis, and not on a claims-made basis.

(ii) Any failure of Consultant to comply with reporting provisions of the policy shall not affect coverage provided to City and its officers, employees, agents, and volunteers.

#### 4.3 Professional Liability Insurance.

a. General Requirements. Consultant, at its own cost and expense, shall maintain for the period covered by this Agreement professional liability insurance for licensed professionals performing the Services pursuant to this Agreement in an amount not less than ONE MILLION DOLLARS (\$1,000,000) covering the licensed professionals' errors and omissions. Any deductible or self-insured retention shall be shown on the Certificate. If the deductible or self-insured retention exceeds TWENTY-FIVE THOUSAND DOLLARS (\$25,000), it must be approved in writing by City.

b. Claims-Made Limitations. The following provisions shall apply if the professional liability coverage is written on a claims-made form:

(i) The retroactive date of the policy must be shown and must be no later than the commencement of the Services.

(ii) Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after the expiration or termination of this Agreement or completion of the Services, so long as commercially available at reasonable rates.

(iii) If coverage is canceled or not renewed and it is not replaced with another claims-made policy form with a retroactive date that precedes the Effective Date of this Agreement, Consultant must provide extended reporting coverage for a minimum of five (5) years after the expiration or termination of this Agreement or the completion of the Services. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the Services under this Agreement. City shall have the right to exercise, at Consultant's sole cost and expense, any extended reporting provisions of the policy, if Consultant cancels or does not renew the coverage.

(iv) A copy of the claim reporting requirements must be submitted to City prior to the commencement of the Services under this Agreement.

#### 4.4 All Policies Requirements.

a. Acceptability of Insurers. All insurance required by this Section is to be placed with insurers with a Bests' rating of no less than A:VII and admitted in California.

b. Verification of Coverage. Prior to beginning the Services under this Agreement, Consultant shall furnish City with certificates of insurance, additional insured endorsement or policy language granting additional insured status complete certified copies of all policies, including complete certified copies of all endorsements. All copies of policies and certified endorsements shall show the signature of a person authorized by that insurer to bind coverage on its behalf. The certificate of insurance must include the following reference: **PLACEMAKING, IDENTITY, & TOURISM MASTER PLAN.** The name and address for additional insured endorsements, certificates of insurance and notice of cancellation is: City of Menifee, 29844 Haun Road, Menifee, CA 92586. City must be endorsed as an additional insured for liability arising out of ongoing and completed operations by or on behalf of Consultant.

c. Notice of Reduction in or Cancellation of Coverage. Consultant shall provide written notice to City within ten (10) working days if: (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; or (3) the deductible or self insured retention is increased. In the event any of said policies of insurance are cancelled, Consultant shall, prior to the cancellation date, submit new evidence of insurance in conformance with this Section 4 to the Contract Administrator.

d. Additional Insured; Primary Insurance. City and its officers, employees, agents, and authorized volunteers shall be covered as additional insureds with respect to each of

the following: liability arising out of the Services performed by or on behalf of Consultant, including the insured's general supervision of Consultant; products and completed operations of Consultant, as applicable; premises owned, occupied, or used by Consultant; and automobiles owned, leased, or used by Consultant in the course of providing the Services pursuant to this Agreement. The coverage shall contain no special limitations on the scope of protection afforded to City or its officers, employees, agents, or authorized volunteers. The insurance provided to City as an additional insured must apply on a primary and non-contributory basis with respect to any insurance or self-insurance program maintained by City. Additional insured status shall continue for one (1) year after the expiration or termination of this Agreement or completion of the Services.

A certified endorsement must be attached to all policies stating that coverage is primary insurance with respect to City and its officers, officials, employees, and volunteers, and that no insurance or self-insurance maintained by City shall be called upon to contribute to a loss under the coverage.

e. Deductibles and Self-Insured Retentions. Consultant shall obtain the written approval of City for the self-insured retentions and deductibles before beginning any of the Services.

During the term of this Agreement, only upon the prior express written authorization of the Contract Administrator, Consultant may increase such deductibles or self-insured retentions with respect to City, its officers, employees, agents, and volunteers. The Contract Administrator may condition approval of an increase in deductible or self-insured retention levels with a requirement that Consultant procure a bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses that is satisfactory in all respects to each of them.

f. Subcontractors. Consultant shall include all subcontractors as insureds under its policies or shall furnish separate certificates and certified endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

g. Variation. The Contract Administrator may, but is not required to, approve in writing a variation in the foregoing insurance requirements, upon a determination that the coverage, scope, limits, and forms of such insurance are either not commercially available, or that City's interests are otherwise fully protected.

4.5 Remedies. In addition to any other remedies at law or equity City may have if Consultant fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, City may, at its sole option, exercise any of the following remedies, which are alternatives to other remedies City may have and are not the exclusive remedy for Consultant's breach:

a. Obtain such insurance and deduct and retain the amount of the premiums for such insurance from any sums due under this Agreement;

b. Order Consultant to stop work under this Agreement or withhold any payment that becomes due to Consultant hereunder, or both stop work and withhold any payment, until Consultant demonstrates compliance with the requirements hereof; and/or

c. Terminate this Agreement.

## **SECTION 5. INDEMNIFICATION.**

5.1 Indemnification for Professional Liability. Where the law establishes a professional standard of care for performance of the Services, to the fullest extent permitted by law, Consultant shall indemnify, protect, defend (with counsel selected by City), and hold harmless City and any and all of its officers, employees, officials, volunteers, and agents from and against any and all claims, losses, costs, damages, expenses, liabilities, liens, actions, causes of action (whether in tort, contract, under statute, at law, in equity, or otherwise) charges, awards, assessments, fines, or penalties of any kind (including reasonable consultant and expert fees and expenses of investigation, costs of whatever kind and nature and, if Consultant fails to provide a defense for City, the legal costs of counsel retained by City) and any judgment (collectively, “Claims”) to the extent same are caused in whole or in part by any negligent or wrongful act, error, or omission of Consultant, its officers, agents, employees, or subcontractors (or any entity or individual that Consultant shall bear the legal liability thereof) in the performance of professional services under this Agreement.

5.2 Indemnification for Other than Professional Liability. Other than in the performance of professional services and to the full extent permitted by law, Consultant shall indemnify, protect, defend (with counsel selected by City), and hold harmless City, and any and all of its officers, employees, officials, volunteers, and agents from and against any and all Claims, where the same arise out of, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or subcontractors of Consultant.

5.3 Limitation of Indemnification for Design Professionals. Notwithstanding any provision of this Section 5 to the contrary, design professionals, as that term is defined in Civil Code Section 2782.8, are required to defend and indemnify City only to the extent permitted by Civil Code Section 2782.8. The term “design professional” as defined in Section 2782.8, is limited to licensed architects, licensed landscape architects, registered professional engineers, professional land surveyors, and the business entities that offer such services in accordance with the applicable provisions of the California Business and Professions Code. This Subsection 5.3 shall only apply to Consultant if Consultant is a “design professional” as that term is defined in Civil Code Section 2782.8.

5.4 Limitation of Indemnification. The provisions of this Section 5 do not apply to claims occurring as a result of City’s sole or active negligence. The provisions of this Section 5 shall not release City from liability arising from gross negligence or willful acts or omissions of City or any and all of its officers, officials, employees, and agents acting in an official capacity.

## **SECTION 6. INDEPENDENT CONTRACTOR.**

At all times during the term of this Agreement, Consultant shall be an independent contractor and shall not be an employee of City. City shall have the right to control Consultant only insofar as the results of the Services rendered pursuant to this Agreement and assignment of personnel pursuant to Subsection 1.3; however, otherwise City shall not have the right to control the means by which Consultant accomplishes the Services rendered pursuant to this Agreement. The personnel performing the Services under this Agreement on behalf of Consultant shall at all times be under Consultant's exclusive direction and control. Consultant shall not at any time or in any manner represent that it is or any of its officers, employees, or agents are in any manner officers, officials, employees, or agents of City. Consultant shall not incur or have the power to incur any debt, obligation, or liability whatever against City, or bind City in any manner. Except for the fees paid to Consultant as provided in this Agreement, City shall not pay salaries, wages, or other compensation to Consultant for performing the Services hereunder for City. City shall not be liable for compensation or indemnification to Consultant for injury or sickness arising out of performing the Services hereunder. Notwithstanding any other City, state, or federal policy, rule, regulation, law, or ordinance to the contrary, Consultant and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to any compensation, benefit, or any incident of employment by City, including but not limited to eligibility to enroll in the California Public Employees Retirement System ("PERS") as an employee of City and entitlement to any contribution to be paid by City for employer contributions and/or employee contributions for PERS benefits.

## **SECTION 7. LEGAL REQUIREMENTS.**

7.1 Governing Law. The laws of the State of California shall govern this Agreement.

7.2 Compliance with Applicable Laws. Consultant and any subcontractor shall comply with all applicable local, state, and federal laws and regulations applicable to the performance of the work hereunder. Consultant shall not hire or employ any person to perform work within City or allow any person to perform the Services required under this Agreement unless such person is properly documented and legally entitled to be employed within the United States. Consultant acknowledges and agrees that it shall be independently responsible for reviewing the applicable laws and regulations and effectuating compliance with such laws. Consultant shall require the same of all subcontractors.

7.3 Prevailing Wages. Consultant acknowledges and agrees that it shall be independently responsible for reviewing the applicable prevailing wage laws and regulations and effectuating compliance with such laws, including, but not limited to the prevailing wage and related requirements set forth in this Subsection 7.3. Consultant shall bear all risks of payment or non-payment of prevailing wages under California law and/or the implementation of Labor Code Section 1781, as the same may be amended from time to time, and/or any other similar law. -This section does not apply.

a. Public Work. Consultant hereby expressly acknowledges and agrees that City has never previously affirmatively represented to Consultant, its employees or agents in writing or otherwise that the Services are not a "public work," as defined in Section 1720 of the

Labor Code. It is agreed by the Parties that, in connection with the development, construction (as defined by applicable law) and operation of the Services, including, without limitation, any public work (as defined by applicable law), if any, Consultant shall bear all risks of payment or non-payment of state and/or federal prevailing wages and/or the implementation of Labor Code Sections 1726 and 1781, as the same may be enacted, adopted or amended from time to time, and/or any other provision of law. To the extent applicable, City will enforce all penalties required by law for Consultant's failure to pay prevailing wages. -This section does not apply.

b. Labor Code of California. The Consultant's attention is directed to Division 2, Part 7, Chapter 1 of the Labor Code of the State of California and especially to Article 2 (Wages); and Article 3 (Working Hours), thereof. -This section does not apply.

(i) In accordance with Sections 1773 and 1773.2 of the Labor Code, City has found and determined the general prevailing rates of wages in the locality in which the public work is to be performed are those determined by the Director of Industrial Relations and available at <https://www.dir.ca.gov/OPRL/2022-1/PWD/Southern.html>. Copies of the prevailing rates of wages are maintained with City's principal office and are available to any interested party on request. Consultant shall post a copy of the prevailing rate of per diem wages at each job site. -This section does not apply.

(ii) Consultant is aware of and will comply with the provisions of Labor Code Section 1776, including the keeping of payroll records and furnishing certified copies thereof in accordance with said Section. Pursuant to Labor Code Section 1771.4, Consultant must submit certified payroll records to the Labor Commissioner using the Department of Industrial Relations' electronic certified payroll reporting (eCPR) system. -This section does not apply.

(iii) Pursuant to Labor Code Section 1810, it is stipulated hereby that eight (8) hours labor constitutes a legal day's work hereunder. -This section does not apply.

7.4 Pursuant to Labor Code Section 1815, work performed by employees of contractors in excess of eight (8) hours per day, and 40 hours during any one week, shall be permitted upon public work upon compensation for all hours worked in excess of eight (8) hours per day at not less than 1 ½ times the basic rate of pay. -This section does not apply

(iv) Pursuant to Labor Code Section 1813, it is stipulated hereby that Consultant shall, as a penalty to City, forfeit twenty-five dollars (\$25) for each worker employed in the execution of this Agreement by Consultant or by any subcontractor hereunder for each calendar day during which such worker is required or permitted to work more than eight (8) hours in any one calendar day and forty (40) hours in any one (1) calendar week in violation of the provisions of Article 3 (commencing with Section 1810), Chapter 1, Part 7, Division 2 of the Labor Code. -This section does not apply.

(v) Consultant is aware of and will comply with the provisions of Labor Code Sections 1777.5 and 1777.6 with respect to the employment of apprentices. Pursuant to Section 1777.5 it is hereby stipulated that Consultant will be responsible for obtaining compliance therewith on the part of any and all sub-consultants or subcontractors employed by Consultant in connection with this Agreement. -This section does not apply.

(vi) Pursuant to Labor Code Section 1775, it is hereby stipulated that Consultant shall, as a penalty to City, forfeit not more than two-hundred dollars (\$200) for each calendar day, or portion thereof, for each worker paid less than the prevailing rates as determined by the Director of Industrial Relations for the work or craft in which the worker is employed for the Services by Consultant or any sub-consultant or subcontractor. -This section does not apply.

a. Bidding Eligibility. Pursuant to Labor Code Section 1771.1, no contractor or subcontractor (or consultant or subconsultant) may be listed on a bid proposal for a public works project unless registered with the Department of Industrial Relations. -This section does not apply.

b. DIR Monitoring. Pursuant to Labor Code Section 1771.4, Consultant is hereby notified that this project is subject to compliance monitoring and enforcement by the Department of Industrial Relations. -This section does not apply.

c. Indemnification Related to Prevailing Wages. Section 5, Indemnification, specifically encompasses Claims arising from or related to (i) the noncompliance by Consultant or any party performing the Services of any applicable local, state, and/or federal law, including, without limitation, any applicable federal and/or state labor laws (including, without limitation, the requirement to pay state prevailing wages and hire apprentices); (ii) the implementation of Labor Code Sections 1726 and 1781, as the same may be amended from time to time, or any other similar law; and/or (iii) failure by Consultant or any party performing the Services to provide any required disclosure or identification as required by Labor Code Section 1781, as the same may be amended from time to time, and/or any other similar law. – This section does not apply.

7.5 Licenses and Permits, Fees and Assessments. Consultant represents, warrants, and covenants to City that Consultant and its employees, agents, and any subcontractors have all licenses, permits, qualifications, and approvals of whatsoever nature that are legally required to practice their respective professions, and perform the Services. Consultant represents, warrants, and covenants to City that Consultant and its employees, agents, and subcontractors shall, at their sole cost and expense, keep in effect at all times during the term of this Agreement any licenses, permits, and approvals that are legally required to practice their respective professions, and perform the Services. In addition to the foregoing, Consultant and any subcontractors shall obtain and maintain during the term of this Agreement valid business licenses from City. Consultant shall have the sole obligation to pay for any fees, assessments, and taxes, plus applicable penalties and interest, which may be imposed by law and arise from or are necessary for Consultant's performance of the Services, and shall indemnify, defend and hold harmless City, its officers, employees or agents of City, against any such fees, assessments, taxes, penalties or interest levied, assessed, or imposed against City hereunder.

7.6 Conflicts of Interest, Political Reform Act. Consultant represents, warrants, and covenants that Consultant presently has no interest, direct or indirect, which would interfere with or impair in any manner or degree the performance of Consultant's obligations and responsibilities under this Agreement. Consultant further agrees that while this Agreement is in effect, Consultant shall not acquire or otherwise obtain any interest, direct or indirect, that would interfere with or impair in any manner or degree the performance of Consultant's obligations and

responsibilities under this Agreement. Consultant acknowledges that pursuant to the provisions of the Political Reform Act (Government Code Section 87100 *et seq.*), City may determine the Consultant to be a

“consultant” as that term is defined by 2 California Code of Regulations Section 18700.3. In the event City makes such a determination, Consultant agrees to complete and file a “Statement of Economic Interest” with the City Clerk to disclose such financial interests as required by City. In such event, Consultant further agrees to require any other person doing work under this Agreement to complete and file a “Statement of Economic Interest” to disclose such other person’s financial interests as required by City.

7.7 Annual Appropriation of Funding. In accord with Article 16 Section 18 of the California Constitution, payment of compensation under this Agreement is contingent upon annual appropriation of funds by City for that purpose. Consultant acknowledges and agrees that to the extent that the Services extend beyond one (1) fiscal year, payment for such Services is expressly conditioned on City’s annual appropriation of funds for such Services for each year. If no funds are appropriated then this Agreement shall be terminated. City pledges and agrees to process such appropriation requests annually and in good faith. Nothing in this Subsection shall be construed to limit the right of either Party to terminate this Agreement as provided herein.

## **SECTION 8. TERMINATION AND MODIFICATION.**

8.1 Termination. City may cancel this Agreement at any time and without cause upon written notification to Consultant.

8.2 Termination by Consultant. Consultant may cancel this Agreement upon 30 days’ written notice to City.

8.3 Consequences of Termination. In the event of termination, Consultant shall be entitled to compensation for the Services performed up to the date of termination; City, however, may condition payment of such compensation upon Consultant delivering to City any or all documents, photographs, computer software, video and audio tapes, and other materials provided to Consultant or prepared by or for Consultant or City in connection with this Agreement.

8.4 Extension. City may, in its sole and exclusive discretion, extend the end date of this Agreement beyond that provided for in Subsection 1.1. Any such extension shall require a written amendment to this Agreement, as provided for herein. Consultant understands and agrees that, if City grants such an extension, City shall have no obligation to provide Consultant with compensation beyond the maximum amount provided for in this Agreement. Similarly, unless authorized by the Contract Administrator, City shall have no obligation to reimburse Consultant for any otherwise reimbursable expenses incurred during the extension period.

8.5 Amendments. The Parties may amend this Agreement only by a writing signed by all the Parties.

8.6 Assignment and Subcontracting. City and Consultant recognize and agree that this Agreement contemplates personal performance by Consultant and is based upon a determination of Consultant’s unique personal competence, experience, and specialized personal knowledge. Moreover, a substantial inducement to City for entering into this Agreement was and is the professional reputation and competence of Consultant. Consultant may not assign this Agreement or any interest therein without the prior written approval of the Contract Administrator. Consultant shall not subcontract any portion of the performance contemplated and provided for herein, other

than to the subcontractors noted in Consultant's proposal, without prior written approval of the Contract Administrator. In the event that key personnel leave Consultant's employ, Consultant shall notify City immediately.

8.7 Survival. All obligations arising prior to the expiration or termination of this Agreement and all provisions of this Agreement allocating liability between City and Consultant shall survive the expiration or termination of this Agreement.

8.8 Options upon Breach by Consultant. If Consultant materially breaches any of the terms of this Agreement, City's remedies shall include, but not be limited to, any or all of the following:

- a. Immediately terminate this Agreement;
- b. Retain the plans, specifications, drawings, reports, design documents, and any other work product prepared by Consultant pursuant to this Agreement;
- c. Retain a different consultant to complete the Services described in Exhibit A; and/or
- d. Charge Consultant the difference between the cost to complete the Services described in Exhibit A that is unfinished at the time of breach and the amount that City would have paid Consultant pursuant to Section 2 if Consultant had completed the Services.

## **SECTION 9. KEEPING AND STATUS OF RECORDS.**

9.1 Records Created as Part of Consultant's Performance. All reports, data, maps, models, charts, studies, surveys, photographs, memoranda, plans, studies, specifications, records, files, or any other documents or materials, in electronic or any other form that Consultant prepares or obtains pursuant to this Agreement and that relate to the matters covered hereunder shall be the property of City. Consultant hereby agrees to deliver those documents to City upon the expiration or termination of this Agreement. It is understood and agreed that the documents and other materials, including but not limited to those described above, prepared pursuant to this Agreement are prepared specifically for City and are not necessarily suitable for any future or other use. Any use of such documents for other projects by City shall be without liability to Consultant. City and Consultant agree that, until final approval by City, all data, plans, specifications, reports, and other documents are confidential and will not be released to third parties without prior written consent of both Parties unless required by law.

9.2 Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for City to copy, use, modify, reuse, or sublicense any and all copyrights, designs, rights of reproduction, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, test data, survey results, models, renderings, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings, digital renderings, or data stored digitally, magnetically, or in any other medium, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents and Data"). Consultant shall require all subcontractors to agree in writing that City is granted a non-exclusive and perpetual license for any Documents and Data the subcontractor prepares under this

Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents and Data. Consultant makes no such representation and warranty in regard to Documents and Data which were prepared by design professionals other than Consultant or provided to Consultant by the City. City shall not be limited in any way in its use of the Documents and Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at City's sole risk.

9.3 Consultant's Books and Records. Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for the Services or expenditures and disbursements charged to City under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such records shall be maintained in accordance with generally accepted accounting principles and shall be clearly identified and readily accessible.

9.4 Inspection and Audit of Records. Any records or documents that Subsection 9.3 of this Agreement requires Consultant to maintain shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of City. Under California Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds TEN THOUSAND DOLLARS (\$10,000.00), this Agreement shall be subject to the examination and audit of the State Auditor, at the request of City or as part of any audit of City, for a period of three (3) years after final payment under this Agreement.

## **SECTION 10. MISCELLANEOUS PROVISIONS.**

10.1 Attorneys' Fees. If either Party to this Agreement brings any action, including an action for declaratory relief, to enforce or interpret the provision of this Agreement, the prevailing Party shall be entitled to reasonable attorneys' fees and expenses including costs, in addition to any other relief to which that Party may be entitled; provided, however, that the attorneys' fees awarded pursuant to this Subsection shall not exceed the hourly rate paid by City for legal services multiplied by the reasonable number of hours spent by the prevailing Party in the conduct of the litigation. The court may set such fees in the same action or in a separate action brought for that purpose.

10.2 Applicable Law, Venue. The laws of the State of California shall govern this Agreement. In the event that either Party brings any action against the other under this Agreement, the Parties agree that trial of such action shall be vested exclusively in Riverside County.

10.3 Severability. If any provision of this Agreement is held invalid, the remainder of this Agreement shall not be affected thereby and all other parts of this Agreement shall nevertheless be in full force and effect.

10.4 Section Headings and Subheadings. The section headings and subheadings contained in this Agreement are included for convenience only and shall not limit or otherwise affect the terms of this Agreement.

10.5 No Implied Waiver of Breach. Waiver by any Party to this Agreement of any term, condition, or covenant of this Agreement shall not constitute a waiver of any other term, condition,

or covenant. Waiver by any Party of any breach of the provisions of this Agreement shall not constitute a waiver of any other provision or a waiver of any subsequent breach or violation of any provision of this Agreement. Acceptance by City of any work or services by Consultant shall not constitute a waiver of any of the provisions of this Agreement. No delay or omission in the exercise of any right or remedy by a non-defaulting Party on any default shall impair such right or remedy or be construed as a waiver. Any waiver by either Party of any default must be in writing and shall not be a waiver of any other default concerning the same or any other provision of this Agreement.

10.6 Successors and Assigns. The provisions of this Agreement shall inure to the benefit of and shall apply to and bind the successors and assigns of the Parties.

10.7 Consultant Representative. All matters under this Agreement shall be handled for Consultant by **Robin Scott Hunden, CEO** (“Consultant’s Representative”). The Consultant’s Representative shall have full authority to represent and act on behalf of Consultant for all purposes under this Agreement. The Consultant’s Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures and for the satisfactory coordination of all portions of the Services under this Agreement.

10.8 City Contract Administration. This Agreement shall be administered by a City employee, **Kristina Hernandez, Industry Marketing & Tourism Coordinator** (“Contract Administrator”). All correspondence shall be directed to or through the Contract Administrator or his designee. The Contract Administrator shall have the power to act on behalf of City for all purposes under this Agreement. Unless otherwise provided in this Agreement, Consultant shall not accept direction or orders from any person other than the Contract Administrator or his designee.

10.9 Notices. Any written notice to Consultant shall be sent to:

HUNDEN PARTNERS  
Attn: Robin Scott Hunden, CEO  
213 W. INSTITUTE PLACE, SUITE 707  
CHICAGO, IL 60610

Any written notice to City shall be sent to the Contract Administrator at:

City of Menifee  
29844 Haun Road  
Menifee, CA 92586  
Attn: Kristina Hernandez, Industry Marketing & Tourism Coordinator

with a copy to:

City Clerk  
City of Menifee  
29844 Haun Road  
Menifee, CA 92586

10.10 Professional Seal. Where applicable in the determination of the Contract Administrator, the first page of a technical report, first page of design specifications, and each page of construction drawings shall be stamped/sealed and signed by the licensed professional responsible for the report/design preparation. The stamp/seal shall be in a block entitled “Seal and Signature of Registered Professional with report/design responsibility,” as in the following example.

Seal and Signature of Registered Professional with report/design responsibility.
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10.11 Rights and Remedies. Except with respect to rights and remedies expressly declared to be exclusive in this Agreement, the rights and remedies of the Parties are cumulative and the exercise by either Party of one or more of such rights or remedies shall not preclude the exercise by it, at the same or different times, of any other rights or remedies for the same default or any other default by the other Party.

10.12 Integration. This Agreement, including the scope of services attached hereto and incorporated herein as Exhibit A, represents the entire and integrated agreement between City and Consultant and supersedes all prior negotiations, representations, or agreements, either written or oral. The terms of this Agreement shall be construed in accordance with the meaning of the language used and shall not be construed for or against either Party by reason of the authorship of this Agreement or any other rule of construction which might otherwise apply.

10.13 Counterparts. This Agreement may be executed in multiple counterparts, each of which shall be an original and all of which together shall constitute one agreement.

10.14 Execution of Contract. The persons executing this Agreement on behalf of each of the Parties hereto represent and warrant that (i) such Party is duly organized and existing, (ii) they are duly authorized to execute and deliver this Agreement on behalf of said Party, (iii) by so executing this Agreement, such Party is formally bound to the provisions of this Agreement, and (iv) that entering into this Agreement does not violate any provision of any other agreement to which said Party is bound.

10.15 Nondiscrimination. Consultant covenants that, by and for itself, its heirs, executors, assigns, and all persons claiming under or through them, that in the performance of this Agreement there shall be no discrimination against or segregation of, any person or group of persons on account of any impermissible classification including, but not limited to, race, color, creed, religion, sex, marital status, sexual orientation, national origin, or ancestry.

10.16 No Third Party Beneficiaries. There are no intended third-party beneficiaries under this Agreement and no such other third parties shall have any rights or obligations hereunder.

10.17 Nonliability of City Officers and Employees. No officer, official, employee, agent, representative, or volunteer of City shall be personally liable to Consultant, or any successor in

interest, in the event of any default or breach by City or for any amount which may become due to Consultant or to its successor, or for breach of any obligation of the terms of this Agreement.

10.18 No Undue Influence. Consultant declares and warrants that no undue influence or pressure is used against or in concert with any officer or employee of City in connection with the award, terms or implementation of this Agreement, including any method of coercion, confidential financial arrangement, or financial inducement. No officer or employee of City shall receive compensation, directly or indirectly, from Consultant, or from any officer, employee, or agent of Consultant, in connection with the award of this Agreement or any work to be conducted as a result of this Agreement.

10.19 No Benefit to Arise to City Employees. No member, officer, or employee of City, or their designees or agents, and no public official who exercises authority over or has responsibilities with respect to this Agreement during his/her tenure or for one (1) year thereafter, shall have any interest, direct or indirect, in any agreement or sub-agreement, or the proceeds thereof, for the Services to be performed under this Agreement.

[Signatures on Following Page]

IN WITNESS WHEREOF, the Parties hereto have executed and entered into this Agreement as of the Effective Date.

**CITY OF MENIFEE**

**CONSULTANT**

\_\_\_\_\_  
Armando Villa, City Manager

\_\_\_\_\_  
Robin Scott Hunden, CEO

Attest:

\_\_\_\_\_  
Stephanie Roseen, Acting City Clerk

\_\_\_\_\_  
Matthew Avila, Project Manager

Approved as to Form:

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

[Note: 2 officer's signatures required if  
Consultant is a corporation, unless provided  
with a certificate of secretary in-lieu]

## **EXHIBIT A**

### **SCOPE OF SERVICES**

Services shall include **PLACEMAKING, IDENTITY, & TOURISM MASTER PLAN** services in the amount not to exceed **One Hundred Twenty Five Thousand Dollars and Zero Cents (\$125,000.00)** as further detailed in the following page(s).

**EXHIBIT A.**



## Attachment A: Cost Proposal

Hunden Partners proposes to complete the scope of work for a **discounted lump sum fee of \$125,000**, which includes all research, travel, and related expenses for up to two (2) trips to Menifee throughout the study process. Any additional trips will be billed at \$1,400 per-person per-day.

A chart detailing our breakdown of estimated hours and fees per task and key personnel is included below. Please note that the total hours and fees estimated below, if calculated with expenses and individual hourly rates, exceeds the Client's identified budget. However, we are proposing a **discounted lump-sum amount** in order to meet the desired needs and goals of the City of Menifee. We remain flexible and open to adjustments.

Estimated Hours & Budget by Proposed Task							
	Rob Hunden, CEO	Jay Burreas, EVP, Tourism	Matthew Avila, PM	Support PM & Analytics Team	Westbound Communications	Total Hours	Budget Estimate
Task 1 – Kickoff and Discovery	4	12	12	12	16	56	\$17,300
Task 2 – Creation of Webpage and Resident Sentiment Survey	2	4	8	10	40	64	\$19,000
Task 3 – Public and Stakeholder Engagement	2	12	20	16	40	90	\$26,950
Task 4 – Menifee Destination Overview	4	10	18	30	0	62	\$17,600
Task 5 – Economic and Demographic Analysis	2	2	6	10	0	20	\$5,650
Task 6 – Destination Product/Signature Event/Asset Opportunity Analysis	2	10	20	24	0	56	\$16,000
Task 7 – Product Investment and Signature Events Recommendations	4	8	12	8	0	32	\$10,100
Task 8 – Creation of Final Placemaking Plan	10	12	18	8	4	52	\$17,150
	30	70	114	118	100	432	\$129,750
Research & Travel Expenses Estimate (assumes 2 in-person trips)							\$14,000
<b>Total Fees IF billed by Hourly Rates and Expenses</b>							<b>\$143,750</b>
Hourly Rates	\$425	\$375	\$300	\$225	\$300	\$300	
<b>Discounted Lump Sum Fee Proposed</b>							<b>\$125,000</b>

Hunden proposes the following billing schedule, broken out by deliverable milestone:

- Kickoff to begin Study: \$18,500
- Delivery of revised work plan, draft webpage and draft survey: \$26,000
- Delivery of findings and recommendations presentation: \$48,000
- Delivery of Draft Master Plan: \$20,000
- Delivery of Final Master Plan: \$12,500



## Understanding of the Assignment

The Hunden Partners Team, including California-based marketing and engagement experts with Westbound Communications (Hunden or Team), is pleased to respond to the City of Menifee's (City or Client) request for proposals to complete a Placemaking, Identity, and Tourism Plan (Plan) for the City of Menifee, California. The Hunden Team proposes to analyze the current tourism assets and aspirations of the community, to determine opportunities for strategic placemaking-related growth, and to produce actionable recommendations.

The City of Menifee was incorporated in 2008 and, with a population of over 100,000, is a rapidly growing bedroom community. Surrounded on all sides by strong destinations, including Anaheim, Laguna Beach, Palm Springs, Big Bear Lake, and others, Menifee is seeking to establish itself as a place for visitors to stay, not simply pass through. The City currently serves as a "gateway" to these other destinations, but desires to establish itself as a destination for visitors and enhance quality of life for residents. Hunden will determine the placemaking gaps and opportunities faced by Menifee, as well as consider the opportunity for a signature event which could help bolster the City's attractiveness to transients and residents alike, and prescribe actionable steps to achieve a more robust destination through product development. This will be supplemented by local engagement and online marketing efforts led by Riverside-based Westbound Communications (WC).

Rooted in data-driven research and stakeholder community member input, the Plan will focus on destination assessment, product retention, expansion, attraction and development, and prioritization of efforts that will best support the growth and competitiveness of the City's tourism economy.

## Scope of Services

We understand that the scope identified in the RFP was divided into five primary work phases. We have a proven methodology for this type of placemaking and tourism plan initiative and believe the following work plan addresses the primary key steps needed to set the City of Menifee up for continued Placemaking planning and destination growth. With the City's budget in mind, we have separated out some scope items and services as optional add-on components to consider.

Hunden Partners proposes to complete the following scope of services to arrive at a final Menifee Placemaking, Identity, and Tourism Plan:

- Task 1 – Kickoff and Discovery
- Task 2 – Creation of Webpage and Resident Sentiment Survey
- Task 3 – Public and Stakeholder Engagement
- Task 4 – Menifee Destination Overview
- Task 5 – Economic and Demographic Analysis

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- Task 6 – Destination Product/Signature Events/Asset Opportunity Analysis
  - Concerts and Entertainment Facilities
  - Sports Facilities and Outdoor Recreation
  - Retail and Dining Nodes
  - Ag/Expo/Fairgrounds
  - Convention and Meetings Facilities/Districts
  - Winery, Brewery, Distillery and Food Hall
  - Hotels
  - Attractions, Including Waterparks and Theme Parks
  - Parks, Trails and Outdoor Space
  - Signature Festivals and Events
- Task 7 – Product Investment and Signature Events Recommendations
- Task 8 – Creation of Final Placemaking Plan

**Optional Add-On Services** - Hunden has worked alongside SMARI and Convergence Design on several Tourism and Placemaking Plans. Many of these plans include the following services:

- SMARI Visitor Sentiment Surveys
- Tourism Workforce Assessment
- Diversity and Inclusion Best Practices
- Architect Services – Land Use, Designs, Layouts, Cost Estimates by Convergence Design



## Methodology

### Task 1: Kickoff and Discovery

Hunden will perform the following orientation and due-diligence oriented tasks during a three-day in-market kickoff trip and site visit to Menifee:

- Connect with and obtain information/data from Explore Menifee, City and County Departments and officials, key stakeholders, and any others as identified by the Client.
- Tour Menifee's existing tourism assets including hotels, nightlife, entertainment and event centers, conference and meeting facilities, sports venues, parks, attractions, and any others.
- Hunden and WC will collaborate with the City to identify community activities that provide potential opportunities to engage the public and solicit feedback throughout the creation of the Plan.
- Stakeholder interviews and focus groups (as described further in Task 3).
- Obtain and review previously completed studies and/or current project plans as relevant. A more in-depth review of existing studies, plans and policy documents will occur in Task 4.

### Task 2: Creation of Webpage and Resident Sentiment Survey

Westbound Communications, in collaboration with Hunden Partners, will develop a webpage to serve as an information resource throughout development of the Plan. WC will proactively manage the page, including posting appropriate project information, graphics, and photographs, connecting with appropriate agencies and stakeholders, and monitoring online conversations to correct misinformation. Westbound will develop a monthly schedule of messages in coordination with City communications, which will be posted several times each week.

**Public/Resident Sentiment Survey.** Creation of the webpage will include collaboration with the City to develop an online public survey for community input relating to the Plan and the future of Menifee. This survey will be part of the larger "perception engagement program" implemented throughout the study. The perception engagement program includes all efforts within the scope of work that involve feedback regarding the destination and its assets, including from city officials, residents, existing and potential visitors, and others.

Hunden will facilitate and complete an electronic resident survey process, utilizing SurveyMonkey or similar, to gather feedback from those living in the area. The survey gives residents an opportunity to share anonymous responses to questions related to the local tourism economy, job creation, new business growth, perception of assets, and general opinion through a resident lens. Hunden will require Client assistance to either push the survey to their social media feed, put on their website or provide a list of email addresses (or all of the above) for us to be able to complete the survey process.

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**Deliverables:** Upon completion of the kickoff trip and creation of the webpage, Hunden will provide the City with a detailed work plan that outlines the schedule for the remainder of the study. This deliverable check-in will occur approximately 2-4 weeks after the notice to proceed, dependent primarily on scheduling of the kickoff and discovery visit (RFP scope task 1.5). This deliverable check-in will also include a draft version of the resident survey for Client review.

### **Task 3: Public and Stakeholder Engagement**

In order to arrive at an action plan that is inclusive and reflects the community's stakeholders and residents, Hunden will conduct a series of outreach initiatives to engage with key stakeholders, community members and area leadership. Hunden will collaborate with City staff on all logistics for the in-person stakeholder meetings. Please note that stakeholder and public engagement is an iterative process that will span the duration of the study process as needed in order to best inform the final Plan. A public involvement/stakeholder memorandum will be provided at the conclusion of Task 9.

**Stakeholder Interviews.** Hunden will interview and obtain information from the Client and other city and county officials, economic development officials, and local business leaders and organizations that the Client deems appropriate. Primary meetings will be conducted during the in-person kickoff, while others will be managed virtually over Zoom as schedules and stakeholder availability dictates.

**Focus Groups.** Hunden will conduct a number of focus groups in-person during the initial kickoff trip and site visit. This will facilitate conversations that will help us understand the needs of community members, business owners, and other key players to help determine objectives of the Placemaking Plan and possible future placemaking product development opportunities.

**Deploy Resident Sentiment Survey.** Once the draft resident sentiment survey is approved, Hunden will issue the survey through the agreed upon channels. Hunden will gather responses and present findings with recommendations in Task 7.

### **Task 4: Menifee Destination Overview**

During the kickoff trip, Hunden will tour the existing tourism assets and destination developments in Menifee to understand what the area has been able to offer in the past and what it believes it has the ability to induce in the future.

Hunden will profile the current supply of destination and placemaking product, offerings and events, address the character of supply, and gather performance and visitation data as appropriate and necessary to inform the analysis. Each assessment will identify product and event gaps in the region and point towards the strengths, weaknesses, and opportunities for the area to expand its placemaking product offerings.



Additionally, Hunden and WC will collaborate to complete an audit of the City's current identity and tourism efforts. This will help determine organizational and communitywide gaps that may hinder future growth.

The Team will review and synthesize strategies found in the following documents, along with any other key data provided by the City:

- City of Menifee Strategic Plan
- Parks Master Plan
- City of Menifee General Plan
- Smart Cities Master Plan
- City of Menifee Comprehensive Economic Development Strategy
- Surrounding Tourism Strategies in the region, as available and relevant
- Local surrounding city/county regional identities, as available and relevant

#### **Task 5: Economic and Demographic Analysis**

Hunden will evaluate Menifee's position as an economic center of activity as well as a destination for visitors. This analysis will provide a realistic assessment of the area's strengths, weaknesses, opportunities and threats (SWOT). Hunden utilizes the latest market data, visitor origin data, demographic data, psychographic data, and other resources to determine a comprehensive view of your marketplace.

#### **Task 6: Destination Product/Asset Opportunity Analysis**

Hunden will assess Menifee's competitive set of tourism assets, as determined by Hunden and the Client upon contract negotiations and approval, to determine gaps and opportunities for product growth. We assess what we call the destination's 'ten pillars of place', which typically include:

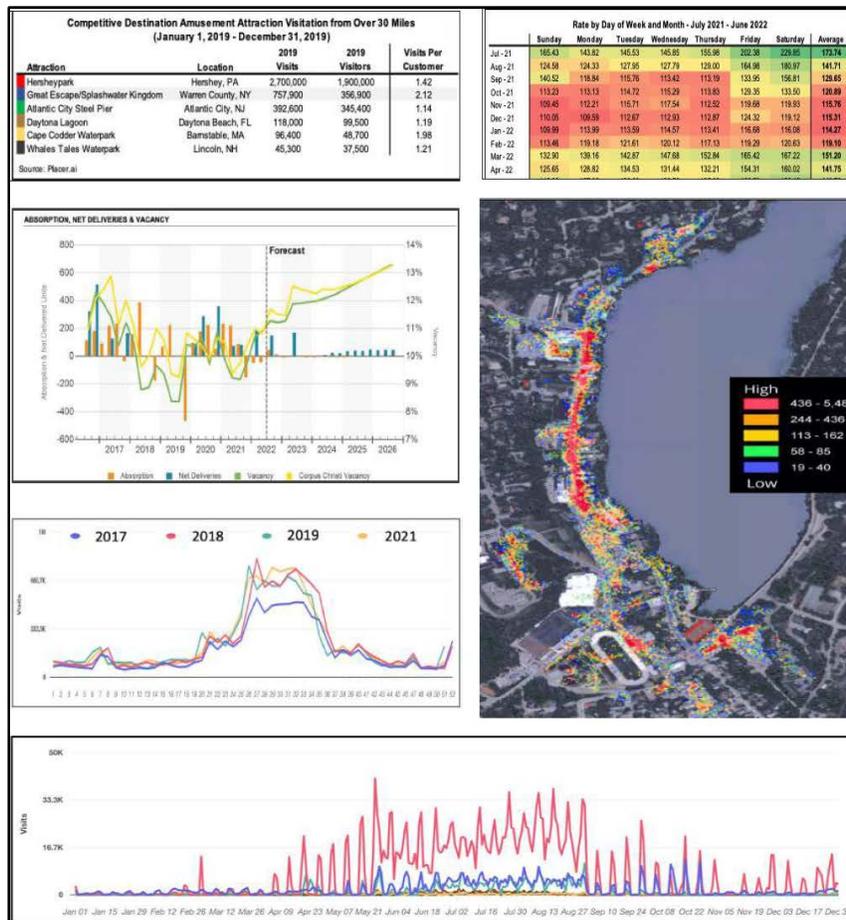
- Concerts and Entertainment Facilities,
- Sports Facilities and Outdoor Recreation,
- Retail and Dining Nodes,
- Convention and Meetings Facilities/Districts,
- Ag/Expo/Fairgrounds,
- Winery, Brewery, Distillery and Food Halls,
- Hotels,
- Attractions, Waterparks and Theme Parks
- Parks, Trails and Outdoor Space, and

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- Signature Festivals and Events.

For each, Hunden will conduct a competitive assessment to address inventory/quantity, location, quality, capacities, gaps and opportunities. Using our cell phone-based data and detailed reports from Placer.ai, Hunden will analyze the demographics and visitation data for key tourism assets in Menifee. Hunden can compare multiple places and their audiences and then view them by “visitor personalities” as defined by Mosaic: Who they are, how they spend their income and what else they do. This analysis will address visitation levels, including in-transit visits between regions in California and beyond. This allows us to summarize current performance of existing tourism assets and segments, as well as untapped markets. Select sample output is illustrated in the following figures taken from some of Hunden’s prior tourism and destination development plans.





**Demand Interviews.** Hunden will conduct interviews with tourism officials, hoteliers, attraction management/ownership, event facility management, public officials, economic development representatives, event planners, sports tournament directors, and show promoters. Hunden will get its most informed responses from phone/Zoom interviews with these key stakeholders. These interviews will help determine what product(s) could thread the needle to improve the market's offerings. Often, new, unique product can significantly outperform existing stock if there is a gap in quality, age, location, etc. that could induce new demand and higher rates to the submarket.

### **Task 7: Product Investment and Signature Events Recommendations**

**Product Investment Recommendations.** Hunden will provide recommendations for the optimal use types and new placemaking products, events and experience developments based on findings and opportunities identified through the prior engagement and market research efforts. The recommendations will be based on the existing market supply, gaps, opportunities and optimizing current and expected trends. Hunden will provide a recommendation or priority by type of use for each, as appropriate.

While specific sites will not be chosen at this stage of study, Hunden will advise on optimal site parameters, quality and general development needs will be noted, as appropriate.

The product recommendations are only the first step, as individual feasibility studies will need to be conducted before any investments should be made. The future action steps will be identified and outlined in the final Placemaking Plan.

**Signature Events Recommendations.** Up to two signature events and their parameters will be identified. The signature event recommendations will include an accompanying timeline for implementation including pre-planning activities, implementation, and post-event activities. Seasonality, venue considerations, primary audience, and other factors will be identified.

### **Task 8: Creation of Final Placemaking Plan**

**Final Master Plan.** Hunden will create a Final Placemaking Plan that prioritizes short- and long- term goals, the necessary future actions to meet the goals, resources that may be used to reach goals, and a timeline or list of most- to least-essential. Westbound Communications will provide high-level implications for marketing and branding of the recommendations, including the signature event. Hunden will deliver a priority list of specific product development that will enable Menifee to grow both leisure and meetings/group business. The focus will be on diverse opportunities that will generate new business mid-week and year-round.

**Public Involvement/Stakeholder Memorandum.** Upon delivery of the draft Plan, Westbound Communications and Hunden will collaborate to provide the compiled results of all public engagement efforts, including the webpage and online communications, stakeholder meetings, and resident survey.

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## Milestones and Deliverables

Hunden Partners proposes the following key milestones, deliverables and communication touchpoints throughout the master plan process:

- **Kickoff Organizing Call** – Once the administrative engagement paperwork process is complete, Hunden will schedule an initial kickoff organizing call/Zoom with the Client team for introductions and to schedule the in-person site visit, tours, and meetings. Hunden will send a kickoff memo outlining requests for data, scheduling arrangements, and key contact information.
- **Task 1 Site Visit/Local Discovery and Engagement** – Members of the Hunden key personnel team will travel to Menifee to conduct a three-day in-person kickoff trip with the Client, including stakeholder meetings, focus groups and interviews and tours of the area’s tourism assets.
- **Circle Back Call** – After the kickoff trip, Hunden will schedule a ‘circle-back call’ with the Client to wrap up data requests and any outstanding discovery phase items.
- **Check-In Calls** – Throughout the study process, Hunden can schedule weekly check-in calls with the Client to ensure timely forward direction through the study process. Calls will occur on an as-needed basis rather than weekly, unless otherwise negotiated.
- **Task 2 Revised Work Plan, Webpage and Resident Survey Draft** – Approximately four weeks after the notice to proceed, Hunden will deliver a revised detailed work plan identifying the key deliverables and timing of the remaining process milestones. Hunden will also deliver a draft of the resident sentiment survey, and CW will deliver a draft of the website for Client review.
- **Task 7 Placemaking Gap Findings and Recommendations Presentation** – Hunden will present a PowerPoint-style deliverable of the findings and recommendations/priorities electronically to the Client.
- **Optional Tasks Results** – Hunden will prepare a summary of findings from the results of the various optional tasks, if authorized, to present to the Client.
- **Draft Master Plan** – Hunden will complete all elements of the scope of work into a draft Master Plan, which will be delivered to the Client electronically for review and comment.
- **Final Master Plan** – Hunden will complete all elements of the scope of work into a final Master Plan, which will be delivered to the Client electronically.
- **Presentation to City Council** – The Hunden Team will present the findings of the Master Plan to City Council in-person.

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## Estimated Timing

We expect the overall timeline for Hunden’s proposed scope of work to be approximately six months, assuming prompt Client responses and availability. Any additional scope items may increase the timeline for the Study. Hunden Partners remains flexible and will work with the Client to arrive at an optimal work plan timeline.

Please note that typically there are three to four weeks needed prior to the start of this timeline for scope and contract negotiations, paperwork authorization, and scheduling/logistics planning needed from notice of award to the start of the kickoff and discovery process.

Our estimated timeline is illustrated in the following figure.

