



# CITY OF LODI

# COUNCIL COMMUNICATION

AGENDA TITLE: Award Agreement for a major revision to the City's Zoning Ordinance to the firm of Crawford, Multari & Clark, Associates.

MEETING DATE: January 20, 1999

PREPARED BY: Community Development Director

RECOMMENDED ACTION: That the City Council approve the awarding of a professional service agreement to the consulting firm of Crawford, Multari & Clark, Associates for a major revision of the City's Zoning Ordinance.

BACKGROUND INFORMATION: The City's zoning ordinance was originally adopted in 1952. While the ordinance has been amended numerous times in the past 47 years, the basic format and language of the document has remained unchanged. Because there has not been a comprehensive revision of the zoning ordinance, the document has become increasingly difficult for both the public and staff to work with and understand. The ordinance is difficult to interpret, has internal inconsistencies and does not always reflect current planning practices or community values.

In order to resolve these problems, the City has determined that a comprehensive revision of the zoning ordinance is required. The City Council has agreed and this task was budgeted as a part of the City's 1997-1999 *Financial Plan and Budget* as a Major City Project to be started during this period. An estimated time frame of 18 months was given for this project.

The Community Development Department has prepared a Request for Proposal (RFP) that was sent to a dozen Northern California planning firms that do this type of work. From this list, and after an interview consisting of the Community Development Director, Public Works Director, Economic Development Coordinator, and Senior Planner, City Staff selected the firm of Crawford, Multari & Clark, Associates of San Luis Obispo, California. This firm has extensive experience in the preparation of zoning ordinances and has done this type of work for many jurisdictions throughout California. Staff is confident that CMC can accomplish the task and produce a zoning ordinance that will serve the City well into the next century.

The Community Development Department requests that the City Council authorize the City Manager to sign an agreement for \$111,780.00 with the firm of Crawford, Multari & Clark, Associates so that work can begin immediately. We would request an additional \$10,000 for contingencies for a total budget of \$121,780.00. A copy of the agreement is attached as well as the scope of work.

FUNDING: \$121,780.00

Funding Available: *Ruby R. Paine for*  
Vicky McAthie  
Finance Director

Konrad Bartlam  
Community Development Director

Attachment

APPROVED: \_\_\_\_\_

H. Dixon Flynn - City Manager

## ATTACHMENT A

### Scope of Work

#### Task 1 - Project Scope Refinement and Initial Public Participation

The consultants must have an in-depth understanding of the City's expectations and objectives for the Zoning Ordinance update before drafting can begin. This task will include a series of discussions with the City's planning staff, some initial public participation opportunities, and other research necessary to fully define the content and format of the Ordinance.

##### Subtasks:

1.1 **Initial scoping meetings.** The consultants will meet with the City's planning staff to:

- Review the City's objectives for the Zoning Ordinance update and User's Guide;
- Refine and detail the project scope and schedule as necessary;
- Inventory problems and issues associated with present City land use and development regulations (including regulatory topics that need attention but are not fully addressed in current ordinances); and
- Review and discuss overall Zoning Ordinance format and organization alternatives.

This subtask is anticipated to include a day of meetings, first including the City's project staff team, followed by staff members involved with: the review and processing of land use permits; public counter work, and answering citizen questions about land use and development regulations. We will also meet with selected staff from other departments as determined to be necessary by the City's project manager.

All three principals of the consultant team will attend these initial meetings.

1.2 **Document review.** The consultants will review all City documents relevant to the Zoning Ordinance update, including but not limited to the General Plan, existing zoning and subdivision ordinances, the *Downtown Development Standards & Guidelines*, adopted in 1997, environmental guidelines, and any development requirements routinely imposed by the Public Works, Fire, or other City departments. We will also work with City staff to review the overall Municipal Code, to identify any other provisions that should be included in Chapter 17 or referenced in the Zoning Ordinance, or that will at least need to be understood so that no conflicts occur with the Zoning Ordinance provisions.

This subtask will involve particular attention to highlighting the goals and policies of the General Plan which give explicit direction for Zoning Ordinance requirements and design guidelines, as well as those which express more general

community expectations (the *Downtown Development Standards & Guidelines*, adopted in 1997) for the character and quality of development and new land uses.

A specific product of this subtask will be an "issues report" including:

- An annotated list of General Plan goals and policies relevant to the land use and development issues addressed in the Zoning Ordinance; and
- A tentative list of other issues that will need to be addressed in the process of drafting the revised Zoning Ordinance, which will include concerns involving both standards for development, and City procedures for development review.

This issues report will guide efforts by the consultants and City staff in the actual drafting of the revised Zoning Ordinance, after it is refined into final form through the following task. The "issues report" will also serve to focus the "policy guidance" workshops in the following task.

After City staff review of the report, the consultants will meet with staff to review/reexamine the information provided. The consultants will then expand and refine the list as determined by staff to be appropriate, for use in the preparation of the draft Zoning Ordinance.

**PRODUCTS:** Annotated list of relevant General Plan goals and policies, and an "issues report" identifying a tentative list of other issues to be addressed in the revised Zoning Ordinance. One reproducible copy will be provided (See Section 5, Project Budget, paragraph B. regarding reproduction services and costs.)

### **1.3 Initial public participation, and policy guidance workshops.**

The consultants will work with City staff to design a public participation/ outreach program intended to solicit public participation and input for preparation of the revised Zoning Ordinance. The outreach program materials may include general announcements, informational handouts, Internet World Wide Web pages, newsletters, newspaper inserts, and slide shows regarding preparation of the revised Zoning Ordinance. These materials will be available to keep citizens and users of the Zoning Ordinance informed about project progress at various stages of the work plan. The consultants will prepare all necessary materials in camera-ready format. The City will be responsible for duplication and distribution.

This subtask will involve a series of meetings with City staff, decision makers, and the public. The meetings will conclude the initial work to define the scope of the Zoning Ordinance update. We propose these meetings based on past experience with similar updates, which suggests that early public and policy body input can assist in defining issues that can be addressed in the Zoning Ordinance update, thereby avoiding later problems of unnecessary controversy, or misunderstandings about the intent and effect of proposed regulations.

Based on recent experience with several of our clients regarding the appropriate number of public workshops, study sessions, and other meetings and/or hearings to be conducted during the preparation and adoption of the updated Zoning Ordinance, we suggest up to six public workshops/meetings/hearings with the Planning Commission over the course of the project, and up to four public workshops/meetings/hearings with the City Council.

In addition to the public outreach program, we anticipate meeting with staff on at least 20 occasions during the course of the project. There will be no limit on the number of meetings with staff during this work program. The recommended work plan is designed to meet the City's public participation and outreach objectives.

The meetings are suggested to include some or all of the following, but the consultants will facilitate any other combination of staff review and public outreach efforts determined by the City's project manager to be more appropriate.

The consultants will work with City staff to define the complete scope of the public outreach program effort; the program may consist of any or all of the following components:

- **Interviews with elected and appointed officials.** The consultants could conduct one-on-one interviews with Planning Commission and City Council members. The consultants would prepare a short memorandum summarizing the more poignant points gained from these interviews;
- **Site Plan and Architectural Review Committee.** The consultants could conduct one workshop with the City's Site Plan and Architectural Review Committee which is responsible for reviewing all multi-family and commercial development proposals. This informal gathering would begin with an explanation of the detailed work plan, schedule, and anticipated products associated with the revised Zoning Ordinance. After the presentation, the attendees would be asked to share their experiences using the existing Zoning Ordinance and any suggestions they could offer to improve the filing and review process, and the number, type, and extent of the standards that could be incorporated into the revised Zoning Ordinance to assist in the design review process;
- **Stakeholders/invited citizens/special interest groups workshops/meetings.** A series of scheduled meetings with individuals and groups suggested by the City's project manager as key contacts within the community who can provide insights and perspective on issues of public interest and concern relative to the City's development regulations and development review process. These meetings would begin with an introduction of the attendees (consultants, City staff, Building Industry Association, Board of Realtors, Chamber of Commerce, Downtown Property Owners Association, local builder groups, sign industry represents, etc.) and continue with an explanation of the detailed work plan, schedule, and anticipated products associated with the revised Zoning Ordinance. After the presentations, the consultants, and City staff, would be available to discuss the specific concerns that the participants may identify and listen to their suggestions

on how to address them. These meetings could be conducted at various public places throughout the City;

- **Field trip.** One field trip with the consultants, City staff, and invited guests (e.g., Council, Commission, Site Plan and Architectural Review Committee, Eastside Improvement Committee, stakeholders, etc.) The field trip would be to assist the City representatives and guests in personally viewing the predominant types of development occurring in the community, good examples the City might like to see again, and examples of development they definitely do not want to see again;
- **Planning Commission and City Council workshops.** One public workshop/meeting with the Planning Commission, and one with the City Council. These noticed public workshops/meetings could be in the form of a jointly held meeting with both the Commission and Council, as deemed appropriate by the City's project manager, and as described below.

A jointly held public Commission/Council workshop/study session, to review the overall objectives for the revised Zoning Ordinance, the detailed work plan and schedule for the project, the anticipated products proposed for the revised Zoning Ordinance, and the list of goals, policies, and issues guiding the Ordinance preparation. The workshop/study session will also provide the opportunity for individual Commission and Council members to express their thoughts on the project, and for the Commission and Council to discuss and/or add issues to the list for consideration, and for other citizens in attendance to provide their input. Additionally, the consultants would present examples (e.g., color slides and overheads) of the type of development occurring in the City, along with samples of development projects that would be designed to reflect the adoption of the revised Zoning Ordinance.

- **Zoning Ordinance Update Home Page.** The consultants will produce a world wide web home page that can be linked to the City's website, providing current information on the status of the project.

Any of the above listed meetings could be conducted on a Saturday in order to provide a less hectic, and more informal environment for the attendees. Our experience supports the finding that this can result in a more productive meeting. (Note: Our experience indicates that a Saturday morning, from 9:00 a.m. to about 1:00/2:00 p.m. would be the most desirable.)

Any, or all, of the above listed workshops/meetings are available to the City; the final choices are entirely up to the City's project manager. The consultants will work with the project manager to schedule these meetings over two consecutive days and up to two consecutive evenings.

**PRODUCTS:** Conduct the initial public outreach program  
 Refine the scope of work for the revised Zoning Ordinance, if needed  
**Meetings:** Day and evening meetings as necessary over two days

- 1.4 Phase I report.** Following input received at the public workshops/meetings and a thorough review of existing zoning and development related documents, and applicable City, State, and Federal provisions, the consultants will prepare a brief technical report outlining preliminary findings, recommendations, alternative approaches, and any issues yet to be resolved.

PRODUCTS: Phase I technical report (findings/recommendations) — one copy.

- 1.5 Draft format and outline description.** Based on the input received from staff and the Commission/Council study session and the conclusions reached/identified in the Phase I report (See Subtask 1.5, above), the consultants will prepare a draft annotated outline, style sheet, and sample chapter to illustrate the intended format and style of the revised Zoning Ordinance. After staff review, the consultants will discuss with staff any desired changes, and direction for the preparation of the chapters covering the zoning district provisions.

PRODUCTS: Zoning Ordinance outline and format description; style sheet; sample chapter in tentatively approved format — one copy.

## Task 2 - Zoning Ordinance Preparation

The Administrative Draft Ordinance and Administrative Draft Initial Study be prepared and delivered in segments, rather than the consultants initially preparing a complete draft for staff review.

### Subtasks:

- 2.1 Zoning district provisions.** The consultants will draft the chapters of the Ordinance containing regulations applicable in specific zoning districts and any desired combining/overlay districts. At a minimum, these chapters will address the following and any other topics desired by the City.
- Incorporation of a use classification system that clearly identifies all allowed uses, while providing a generic-type of listing, to the maximum extent possible, rather than a lengthy “laundry/shopping list” of allowed uses. Special attention will be given to creating a consistent list of land use types for use in each of the various zoning districts, and reviewing each district with staff to ensure that specific allowable uses are appropriate in each zone and consistent with the General Plan.
  - The allowable uses will be listed specifically for each zoning district, rather than the cumulative method of zoning. The consultants are able to incorporate the cumulative method (“pyramid zoning”) if desired by City staff; however, our experience strongly supports the non-cumulative approach as the most user friendly and simple to understand and administer.
  - The zoning districts, the land uses allowed within them, and the type of ministerial or discretionary land use approval required for each use (some uses may be allowed with no land use permit, subject to compliance with applicable standards and obtaining any necessary construction permits).

- The newly improved Downtown could benefit from its own exclusive zoning district or overlay zone in order to help ensure preservation of its uniqueness, quality of development, and economic viability. Development standards unique to the Downtown could be written as incentives for locating in the Downtown (e.g., increased height limitations, decreased setbacks, greater site coverage requirements, etc.), rather than in the expanding southwest portion of the City's sphere.
- Any combining/overlay districts desired by the City to highlight areas where the General Plan has identified important community features, sensitive environmental characteristics, natural or built hazards that must be carefully considered in proposed development, and new land uses.
- Development standards unique to individual zoning districts (e.g., height limitations, setback requirements, site coverage requirements, etc.), organized in tables wherever possible.

The zoning and combining/overlay district provisions will be sent to staff for review, after which the consultants and staff will meet to discuss desired changes, and direction for preparing the chapters covering administrative provisions.

PRODUCTS: Administrative draft zoning and combining/overlay district provisions, revised definitions — one copy.

**2.2 Administrative provisions.** The consultants will draft the chapters of the Ordinance containing Ordinance administration and filing/processing procedures. At a minimum, these chapters will address the following and any other topics desired by the City.

- Purpose and adoption of the Zoning Ordinance, applicability, responsibility and authority for its administration, interpretation procedures, and provisions addressing "pipe line" applications (applications deemed complete but not yet approved/disapproved, affected by a zoning map/ordinance and general plan amendment).
- Definition of the roles of each project review entity, including the Community Development Director, Department, Planning Commission, City Council, and any other necessary entities (e.g., Site Plan and Architectural Review Committee, etc.).
- Administrative procedures for discretionary use permits, variances, planned developments permits, development agreements, design and site plan review, specific plans, appeals, nonconforming use and structure provisions, zoning map/ordinance and general plan amendments, etc. Proposed procedures will emphasize efficient, simple, and streamlined processing, while providing for effective project review to ensure quality development.
- Code enforcement provisions, including, but not limited to, legal remedies (both criminal and civil), procedural requirements, full recovery of costs directly related to an enforcement action, and the clear identification of the property owner's/violator's rights and procedures for appeal.

- Environmental compliance procedures for implementation of State Law (Public Resources Code Sections 21000 - 21177) more commonly referred to as the California Environmental Quality Act (CEQA).
- Definitions of the technical terms and phrases used in the regulations, including the abbreviations used throughout the Zoning Ordinance. An initial set of definitions will be included with the first submittal, and will be supplemented as each later submittal is completed.

Copies of these draft provisions will be transmitted to the staff for review. The consultants will then meet with staff to go over the work and discuss desired changes, and discuss direction for preparation of the general development and specific use standards for the Zoning Ordinance, per Task 2.2. At the same meeting, the consultants will work with staff to identify policy issues that will be presented at the policy study session in Task 2.3.

PRODUCTS: Administrative draft Zoning Ordinance procedural/administrative chapters — one copy.

### 2.3 Commission/Council policy workshop.

Typically this would be an appropriate point in the ordinance drafting process to obtain direction from the Council on any Zoning Ordinance issues where early policy direction will assist in more efficient review and deliberations by the Commission and Council when they later consider adoption of the revised Zoning Ordinance. The consultants will assist staff in facilitating a joint Planning Commission/City Council workshop.

The workshop will provide for public input, and a structured setting for Commission/Council review and discussion of the zoning issues identified by City staff and the consultants. The direction obtained from this workshop will assist in the consultants' preparation of the general development and specific use standards in Task 2.4, and may also result in refinements to the zoning district provisions from Task 2.2, which would be incorporated into the Preliminary Draft.

### 2.4 General development and specific use standards. The consultants will draft the chapters of the Ordinance containing regulations that apply in multiple zones and combining/overlay districts, and regulations for specific land uses. At a minimum, these chapters will address the following and any other topics desired by the City.

- The general applicability of standards including, but not limited to, floor area ratio, height limits, measurement standards, setbacks, and any directly-related provisions for non-variance exceptions or adjustments to the standards.
- Standards for off-street parking and loading facilities for residential, commercial, and other types of development, including parking and loading area design, layout and landscaping requirements, and standards for bicycle facilities. These provisions will also address on-site pedestrian and vehicular circulation.

- Standards which may include, but are not limited to, agricultural (wine grapes) preservation (e.g., right-to-farm and appropriate agricultural buffering), affordable housing and density bonus provisions, conservation/management/protection of the cultural and natural resources within the City, fences, hedges, and walls, screening and buffering, solar access, sight visibility areas, and undergrounding of utilities.
- Performance-based standards including, but not limited to, air quality, electrical interference, explosive and fire hazards, hazardous materials storage, noise, odor, outdoor light and glare, and vibrations.
- Comprehensive sign regulations.
- Standards which may include, but are not limited to, mixed use projects, clustered residential projects, condominium conversion, planned developments; landscaping (commercial, residential, and other types of development, etc.); environmental resource protection, etc.
- Standards for specific land uses that will apply regardless of the zoning district in which they are located. These provisions will include provisions from the current Ordinance and others, as desired by the City (e.g., adult businesses, child day care, drive-in/drive-through facilities, home occupations, live entertainment, mobilehome and travel trailer parks, secondary dwelling units, solid waste disposal and recycling facilities, telecommunications facilities, etc.)

Copies of the chapters will be transmitted to staff for review and the consultants will meet with staff after their review to discuss desired changes.

PRODUCTS: Administrative draft general development and specific use standards, revised definitions — one copy.

2.5 **Design provisions.** The consultants will draft the chapters/sections of the Zoning Ordinance containing design guidelines that apply in multiple zones and any combining/overlay districts. At a minimum, these chapters/sections chapters will address the following and any other topics desired by the City.

- Design guidelines addressing residential, commercial (with special emphasis on the southwest portion of the City and the resulting impact of that development on the newly improved Downtown), and industrial developments in the City.
- Design guidelines which supplement the chapters on landscaping, parking, and signs.
- Commercial design guidelines addressing Cherokee Street.
- Possibly incorporate the design guidelines identified in the *Downtown Development Standards & Guidelines*, adopted in 1997; subject to City staff approval.

Copies of the chapters will be transmitted to staff for review and the consultants will meet with staff after their review to discuss desired changes.

PRODUCTS: Administrative draft design guidelines, revised definitions — one copy.

- 2.4 **Subdivision regulations.** The consultants will draft the revised chapters for the City's subdivision regulations, in compliance with current Map Act requirements, case law, Attorney General opinions, and consistent with the format/style of the Zoning Ordinance provisions prepared earlier. (While current thinking has the subdivision regulations remaining a stand-alone document, the City may consider incorporating these regulations into the revised Zoning Ordinance. This incorporation could result in a truly integrated (e.g., all definitions in one article, all procedures in one article, all standards in one article, etc.) Development Code, if deemed appropriate by the City.) Like the other provisions of the administrative draft, preparation of these components will involve extensive coordination and consultation between the consultants and City staff. At a minimum, these chapters will address the following and any other topics desired by the City.

- Provide updated procedures for the processing of tentative (including vesting tentative), parcel and final maps, certificates of compliance, lot line adjustments, mergers, and public improvements;
- Include all provisions required by the Subdivision Map Act, and reference the Map Act wherever appropriate;
- Effectively reference related zoning and other applicable development regulations that must be considered in subdivision design; and
- Also include standards for condominium, townhouse, and other types of subdivided residential projects as determined by City staff to be necessary.

Copies of the chapters will be transmitted to staff for review and the consultants will meet with staff after their review to discuss desired changes.

PRODUCTS: Administrative draft subdivision regulations, revised definitions — one copy.

- 2.7 **Administrative Draft Initial Study.** The consultants will prepare and submit for staff review and comment an Administrative Draft Initial Study for the Zoning Ordinance update, in compliance with CEQA. This will be submitted at the same time as the general development and specific use standards prepared under Task 2.4, and will be reviewed and discussed with staff during the same meeting where the general development and specific use standards will be reviewed.

PRODUCTS: Administrative Draft Initial Study — one copy.

- 2.8 **Preliminary Draft.** This task will include revisions to the contents of the administrative draft segments based on previous staff input, and preparation of the remaining parts of the Preliminary Draft Zoning Ordinance, including a detailed table of contents, and the inclusion of all the graphics and illustrations

needed for the revised Zoning Ordinance. This task will also produce a Preliminary Draft Initial Study incorporating any revisions directed by staff after their review of the administrative draft.

Graphics will be used throughout the Zoning Ordinance wherever they may assist users in visualizing the meaning and applicability of development standards, or otherwise improving understanding or ease of use. Most of the graphics will likely be placed within Ordinance sections dealing with site planning and related issues (e.g., parking and signs), and in the definitions. The administrative provisions may incorporate flowcharts and other graphics if staff and the consultants determine that the illustration of procedures would be helpful. There will be no limit on the number of graphics incorporated into the revised Zoning Ordinance.

We will assemble a complete Preliminary Draft Zoning Ordinance and Initial Study, and forward copies to staff for review and comment. We will meet with staff if necessary to review their comments and desired changes, but will handle any needed discussion via a conference call if feasible.

PRODUCTS: Preliminary Draft Zoning Ordinance and Initial Study — one copy.

- 2.9 **Screencheck Draft.** A Screencheck Draft Ordinance will be prepared and provided to the City to verify that all requested changes to the Preliminary Draft and the Preliminary Draft Initial Study have been properly completed, and that all final graphics are acceptable.

PRODUCTS: Screencheck Draft Zoning Ordinance and Initial Study — one copy.

- 2.10 **Public review draft Ordinance.** A public review draft Ordinance and Initial Study will be prepared and provided to the City for review by the City Council, Planning Commission, and the general public during the public review/ hearing process.

PRODUCTS: Draft Zoning Ordinance and Initial Study — one copy.

### Task 3 - Public Review and Adoption

#### Subtasks:

- 3.1 **Public hearing notices and staff report.** The consultants will assist in the preparation of public hearing notice materials. The consultants will also prepare the core of the Commission and Council staff reports in the form of narrative and matrix comparisons of existing and proposed zoning districts and related development standards.

PRODUCTS: Draft materials for incorporation into the City's staff reports — one copy.

- 3.2 **Planning Commission workshops/hearings.** The consultants will attend up to six public workshops and/or hearings with the Planning Commission to review the draft documents. Each workshop/hearing would be preceded by meetings with staff to work out respective responsibilities, and review conclusions reached at the prior meeting, to the extent that "debriefing" did not occur immediately after the preceding meeting or later via telephone. During the workshops, the consultants will facilitate Commission and public review, answer questions about proposed provisions, discuss possible changes, and draft changes to specific sections in response to staff or Commission direction, for consideration at the later meetings.

At least two of the consultants will attend all Planning Commission workshops/hearings, as necessary to address the specific sections being considered by the Commission at the scheduled meeting. The estimated person hours required for this subtask are shown on page 33.

- 3.3 **Negative Declaration.** The consultants will assist in concluding the environmental review process for the Zoning Ordinance update by revising the Initial Study as necessary to reflect Planning Commission changes to the Draft Zoning Ordinance, and adding the additional information necessary for a Negative Declaration. Recognizing that the Zoning Ordinance update was identified as an implementation program in the General Plan, and based on the consultants' experience with the preparation of comprehensive zoning documents which are designed to implement the General Plan, a Negative Declaration would be appropriate for the Zoning Ordinance update.

PRODUCTS: Draft Negative Declaration — one copy.

- 3.4 **City Council workshops/hearings.** The consultants will attend and participate in up to four workshops/public hearings where the City Council considers the adoption of the revised Zoning Ordinance. It is not anticipated that the draft documents will be revised following the Planning Commission's hearings, but rather that an addendum containing the Commission's recommended changes will be prepared, and the draft ordinance will be retained in its original form so that the Council will be able to easily identify the Commission's recommended changes.

At least two of the consultants will attend all City Council workshops/public hearings, as necessary to address the specific sections being considered by the Council at the scheduled meeting. The estimated person hours required for this subtask are shown on page 33.

- 3.5 **Screencheck Final Zoning Ordinance.** After adoption of the Zoning Ordinance and before its effective date, the consultants will prepare a final version, incorporating all changes made by the City Council. The consultants will provide screencheck version of the ordinance so that the City can verify that the document accurately incorporates all changes approved by the Council during the adoption process.

PRODUCTS: Screencheck Final Ordinance — one copy.

- 3.6 **Final Zoning Ordinance.** The consultants will prepare a final version of the revised Zoning Ordinance for delivery to the City, including a detailed index, for codification and publication, incorporating any changes to the screencheck ordinance identified by staff. The consultants will provide a camera-ready copy of the adopted Zoning Ordinance and a diskette copy in any word processing software preferred by the City. (It is understood that the Department currently uses Microsoft Office 95; however the final Zoning Ordinance can be provided in any popular word processing software preferred by the City.) All graphics produced by the consultants will be provided in both reproducible hard copy form and in electronic form, in any graphic software format preferred by the City.

PRODUCTS: Final Zoning Ordinance, one camera-ready copy and a diskette in Microsoft Office 95 or other work processing format desired by the City staff.

- 3.7 **Staff training/orientation meeting.** After delivery and reproduction of the final document, the consultants will conduct an orientation for appropriate City staff who will be primarily responsible for administration of the revised Zoning Ordinance. The orientation will provide an overview of Ordinance organization, and specific examples of using the Ordinance to answer public questions about zoning requirements, and to evaluate land use/development permit applications.

The three principals will perform this subtask. The estimated person hours required for this subtask are shown on page 33.

#### **Task 4 - On-Line Zoning Ordinance**

The consultants will produce a complete, hypertext version of the Zoning Ordinance for the City's web site, containing all text and illustrations. The functional details of the On-Line Zoning Ordinance and the appearance of its user interface will be worked out through discussions with staff during the initial project meetings; however, the following describes our suggested approach.

A user of the Zoning Ordinance website would find a scrollable hypertext table of contents showing titles of all chapters. Any selection would jump to the applicable page. Each page is scrollable (pages larger than the computer screen frame can be shifted up or down to allow viewing all parts of the page). "Forward" and "Back" buttons on the toolbar at the top of the screen will allow moving from page to page.

Additional functions will allow: printing individual or groups of pages; saving one or more pages to a text file; marking a page or section for future reference; and accessing a key word index of sections. The following example illustrates the appearance of an on-line Development Code that the consultants are currently preparing.

The website Zoning Ordinance would be produced in two tasks. A "proof of concept" version, consisting of the user interface, search and other facilities with a demonstration portion of the data, would be produced for staff review. A final, complete version of the website would be produced after Council adoption of the final documents.

The consultants will install a test version of the software in the Community Development Department and instruct staff on its use. Based on staff feedback from use of the test version, the consultants will prepare final versions of the software and conduct workshops for staff on the installation and use of the system. The consultants will remain available to answer staff questions and correct any problems with the software for a period of one year at no additional cost to the City.

**Project Timetable**

The time schedule for the Lodi Zoning Ordinance update anticipates completion of the preliminary draft Code within approximately 8 to 10 months following receipt of the City's "Notice to Proceed." Our experience with other similar projects suggests that the critical path in meeting this schedule is the time required by City staff (Planning, Attorney, Engineering, etc.) to review the individual draft segments in order to provide direction to the consultants for any desired changes. Adoption of the revised Zoning Ordinance and preparation of final documents is then dependent upon the timely scheduling and completion of Planning Commission and City Council workshops and hearings, but could be completed within a total of 12 to 18 months as shown on the following detailed project schedule.

**PROJECT SCHEDULE BY SUBTASK**

Subtasks	To Be Submitted/Conducted*
<b>1 — Project Scope Refinement and Initial Public Participation</b>	
1.1 Initial scoping meetings	Within 30 days of City's "Notice to Proceed"
1.2 Document review	During the next four+ weeks
1.3 Initial public participation, and policy guidance workshops	Within 60 days of City's "Notice to Proceed"
1.4 Phase I report	Within 30 days following Subtask No. 1.3
1.5 Draft format and outline description	Within 30 days following return of Subtask No. 1.4
<b>2 — Zoning Ordinance Preparation</b>	
2.1 Zoning district provisions	Within 45 days following return of Subtask No. 1.5
2.2 Administrative provisions	Within 30 days following submittal of Subtask No. 2.1
2.3 Commission/Council policy workshop	Within 60 days following submittal of Subtask No. 2.2
2.4 General development and specific use standards	Within 30 days following submittal of Subtask No. 2.3
2.5 Design guidelines	Within 30 days following submittal of Subtask No. 2.3
2.6 Subdivision regulations	Within 30 days following submittal of Subtask No. 2.5
2.7 Administrative Draft Initial Study	Within 30 days following submittal of Subtask No. 2.5
2.8 Preliminary Draft Ordinance	Within 60 days following return of Subtask No. 2.5
2.9 Screencheck Draft Ordinance	Within 45 days following return of Subtask No. 2.8

Subtasks	To Be Submitted/Conducted*
2.10 Public review draft Ordinance	Within 30 days following return of Subtask No. 2.9
<b>3 — Public Review and Adoption</b>	
3.1 Public hearing notices/staff report	To be determined at a later date
3.2 Planning Commission workshops/hearings	To be determined at a later date
3.3 Negative Declaration	To be determined at a later date
3.4 City Council workshops/hearings	To be determined at a later date
3.5 Screencheck Final Zoning Ordinance	Following Task 3.4; to be determined at a later date
3.6 Final Zoning Ordinance	To be determined at a later date
3.7 Staff training/orientation meeting	Following Task 3.6; to be determined at a later date
<b>4 — On-line Zoning Ordinance</b> (To be determined at a later date)	

\* Submittal dates for all drafts presumes a timely turn-around of the previously submitted draft(s) by City staff.

## 4. QUALIFICATIONS

### A. Team Member Profiles

#### Paul Crawford, AICP

A principal with Crawford Multari & Clark Associates, Paul Crawford's planning career has focused on simplifying and clarifying land use regulations for a wide variety of cities and counties, and on designing and implementing computer software and other office automation tools for planning agencies. Before forming Crawford Multari & Clark, he served from 1980 to 1990 as both Director of Planning and Building for San Luis Obispo County, and Executive Director of the San Luis Obispo Council of Governments (COG). Those positions followed five years of service to San Luis Obispo County in four other staff assignments, prior consulting work, and a staff position with the City of Visalia.

His professional research interests are in the drafting of zoning, development, and subdivision regulations and designing planning agency computer applications. His work on the San Luis Obispo County Land Use Ordinance was recognized by an award from the California Chapter of the American Planning Association in 1981, and his work with Crawford Multari & Clark Associates has been recognized by six additional awards from the California Chapter of the American Planning Association. Crawford was elected to the California Planning Roundtable in 1993 and received the California Chapter of the American Planning Association "Distinguished Leadership — Professional Planner for Excellence" award in 1998.

#### Bruce Jacobson

Principal of Jacobson & Wack, Bruce Jacobson is a land use planner and administrator with over 27 years of planning experience. With Jacobson & Wack he has prepared numerous zoning ordinances, subdivision ordinances, design guidelines, and development codes. Earlier planning positions include Deputy Planning Director for San Luis Obispo County, Principal Planner for Ventura County, and Interim Planning Director for the City of Santa Paula.

His work on the City of San Bernardino Development Code was recognized with a National award for outstanding planning from the American Planning Association in 1992. The APA award selection jury cited the Code's easy to use format, graphics, and straightforward (non-legalistic) language as major attributes contributing to the "user-friendly" nature of the Code. The San Bernardino Development Code combined zoning, subdivision, design guidelines, and hillside preservation standards into one comprehensive, internally integrated document.

#### J. Laurence Mintier, AICP

J. Laurence Mintier has nearly 25 years experience as a planner focusing on local planning issues. As a consultant in the last 15 years, he has worked for nearly 50 cities and counties; for more than half of these, he prepared their general plans, individual general plan elements, or zoning codes. This work includes the Land Use Element and Housing Element for the Lodi General Plan. Mr. Mintier is a recognized authority on general plans and local planning matters. He is a frequent instructor and speaker, and has served as a consultant or expert witness in over 20 land use lawsuits.

Prior to establishing his consulting practice in 1983, Mr. Mintier worked for the Governor's Office of Planning and Research. There he directed preparation of California's General Plan Guidelines and 1982 revisions. Mr. Mintier also directed other major projects including the 1981 Symposium on California Planning Law, annual surveys of local planning programs, and guidelines for local implementation of the California Coastal Act.

As staff to the Governor, Mr. Mintier developed and reviewed legislation concerning local government organization, land use, development, and environmental issues. During the 1981-1984 period, he served as a member of the State Planning Law Task Force and the State Planning Law Advisory Group and was actively involved in developing 1984 amendments to the State Planning Law (AB 2038).

During his tenure with the Governor's Office, Mr. Mintier worked with and advised numerous state agencies on developing regulations, guidelines, and programs affecting local governments. As a member of OPR's Local Government Unit, Mr. Mintier provided technical advice to local governments and citizens statewide on plans and programs and on interpreting State Planning Law.

## B. Relevant Zoning Ordinance Experience

Members of the standing team of Crawford Multari & Clark Associates (CMCA) and Jacobson & Wack (J&W) have individually, and together, prepared over 40 zoning and development codes, subdivision ordinances, and design guidelines documents, as both consultants and prior city and county staff. On many previous and current projects they have teamed with Urban Design Studio (UDS), located in Irvine. This extensive body of work includes the following projects, some of which are work in progress.

- Coastal Zoning Ordinance, City of Oxnard (J&W)
- Coastal Zoning Ordinance, City of Guadalupe (CMCA)
- Coastal Zoning Ordinance, San Luis Obispo County (Crawford)
- Code of Ordinances reorganization, Moss Landing Harbor District (CMCA)
- Code of Ordinances reorganization, Port San Luis Harbor District (CMCA)
- Design Guidelines, City of Buellton (CMCA)
- Design Guidelines, City of Desert Hot Springs (CMCA)
- Design Guidelines, City of San Buenaventura (CMCA)
- Design Guidelines, City of Woodland (CMCA)
- Design Guidelines, County of San Luis Obispo (CMCA)
- Design Guidelines for Transit Oriented Development, County of Sacramento (Mintier)
- Development Code (zoning/subdivision/design), City of Alameda (J&W, UDS)
- Development Code (zoning/subdivision/grading), City of Calabasas (CMCA)
- Development Code (zoning/subdivision/design), City of Chico (CMCA, J&W, UDS)
- Development Code (zoning/subdivision/design), City of Diamond Bar (CMCA, J&W, UDS)
- Development Code (zoning/subdivision), City of Hollister (CMCA, J&W)
- Development Code (zoning/subdivision/design), City of Mission Viejo (J&W, UDS)
- Development Code (zoning/subdivision), City of Murrieta (J&W, UDS)
- Development Code (zoning/subdivision/design), City of San Bernardino (J&W, UDS)
- Development Code (zoning/subdivision/design), City of Sonoma (CMCA, J&W, UDS)
- Development Code (zoning/subdivision), City of Stockton (CMCA, J&W, UDS)
- Development Code (zoning/subdivision), County of Marin (CMCA, J&W)
- Development Code, Lake Havasu City, Arizona (CMCA, J&W, UDS)
- Development Code (zoning/subdivision/design), Town of Truckee (CMCA, J&W, UDS)

- Land Use Ordinance, County of San Luis Obispo (Crawford)
- ✓ Neotraditional Design Options Model Ordinance, San Luis Obispo County COG (CMCA)
- ✓ Neotraditional Design Options Ordinance / Design Guidelines, City of Paso Robles (CMCA)
- Zoning and Subdivision Ordinances, City of Huntington Park (J&W, UDS)
- Zoning and Subdivision Ordinances, City of Rancho Mirage (J&W)
- Zoning Ordinance, City of Alhambra (J&W)
- Zoning Ordinance, City of Buellton (CMCA)
- Zoning Ordinance, City of Culver City (CMCA, J&W, UDS)
- Zoning Ordinance, City of Desert Hot Springs (CMCA, J&W)
- Zoning Ordinance, City of Fillmore (J&W, UDS)
- Zoning Ordinance, City of Fountain Valley (CMCA, J&W, UDS)
- Zoning Ordinance, City of Galt (Mintier)
- Zoning Ordinance, City of Glendora (J&W)
- Zoning Ordinance, City of Healdsburg (Mintier)
- Zoning Ordinance, City of Malibu (CMCA, J&W, UDS)
- Zoning Ordinance, City of Manteca (Mintier)
- Zoning Ordinance, City of Mountain View (CMCA, J&W)
- Zoning Ordinance, City of Norwalk (CMCA, J&W, UDS)
- Zoning Ordinance, City of Novato (CMCA, J&W, UDS)
- Zoning Ordinance, City of Pismo Beach (CMCA, J&W, UDS)
- Zoning Ordinance, City of Santa Monica (J&W)
- Zoning Ordinance, City of Tustin (CMCA, J&W, UDS)
- Zoning Ordinance, County of Kern (Mintier)
- Zoning Ordinance, County of Placer (CMCA)
- Zoning Ordinance, Town of Loomis (CMCA, J&W)
- Zoning Ordinance, Town of Windsor (CMCA, J&W, UDS)
- Zoning Ordinance Reformatting, City of Sacramento (Mintier)
- Zoning Ordinance Update Technical Assistance, City of Fairfield (CMCA)
- Zoning Ordinance Update Technical Assistance, City of Roseville (CMCA)
- Sign Ordinance, City of Buellton (CMCA)
- Sign Ordinance, City of Modesto (CMCA)
- Subdivision Ordinance, City of Buellton (CMCA)
- Subdivision Ordinance, City of Manteca (Mintier)
- Subdivision Ordinance, County of Kern (Mintier)
- Subdivision Ordinance, County of Mendocino (CMCA)

### C. Selected References

Our team members have worked on over 40 zoning ordinance, subdivision, and development code projects. We encourage the City staff to contact our past and current clients to gain an understanding and "comfort level" regarding our ability to complete identified projects and tasks in a timely manner, with a high level of quality and accuracy, and within the approved budget constraints. We have never required a budget adjustment for a zoning project; unless additional work products were requested by the staff. The following are selected and relevant examples of these projects by team members.

City of Novato Zoning Ordinance - Crawford Multari & Clark Associates (CMCA), Jacobson & Wack (J&W), and Urban Design Studio (UDS) are preparing a comprehensive update of the Novato Zoning Ordinance, which follows the adoption of the City's new General Plan. Paul Crawford is project manager. The update is focusing on usability, and the integration of new regulations on sensitive habitat and other

sensitive environmental and scenic resources, in compliance with the environmental regulations of the San Francisco Bay Conservation and Development Commission (BCDC). Work began on this project in April, 1998, and a complete administrative draft ordinance was delivered to the City for staff review on June 30, 1998.

Contact: Alan Lazure, Principal Planner  
415-897-4306

**City of Calabasas Development Code** - Paul Crawford prepared this City's first Development Code including zoning, subdivision, and grading ordinances, together with regulations for erosion and sedimentation control consistent with NPDES requirements. Code preparation occurred concurrently with the adoption process for the City's new General Plan, and addressed issues of hillside development in addition to common zoning and subdivision topics. The new code was adopted by the City in July, 1998.

Contact: Marilyn Miller, AICP, Senior Planner  
City of Calabasas  
818-878-4225

**City of Chico Development Code (CMCA, J&W, UDS)** - Working with Urban Design Studio (UDS), Crawford and Jacobson are preparing comprehensive revisions to the City's Zoning and Subdivision Ordinances following the adoption of a new General Plan, and the integration into the Development Code of new community design guidelines. Besides implementing new General Plan policies involving compact urban form and other community design issues, the update emphasizes logical organization and ease of use, as well as streamlining the development review process.

Contact: Pam Figge, Senior Planner  
City of Chico  
916-895-4851

**City of Fillmore Zoning Ordinance (J&W, UDS)** - Completed a new Zoning Ordinance for a small, mature City devastated by the 1994 Northridge earthquake.

Contact: J. Anthony Perez, Associate Planner  
City of Fillmore (now with the City of Camarillo)  
805-388-5357

**Marin County Development Code (CMCA, J&W)** - Revising the County's zoning and subdivision ordinances into a comprehensive Development Code, including regulations for development within the Coastal Zone. Issues addressed range from standards for high quality urban development, to agricultural land preservation, to development within environmentally sensitive areas subject to the different requirements of the California Coastal Commission and the San Francisco Bay Conservation and Development Commission (BCDC).

Contact: Scott Davidson, AICP, Planning Manager  
Marin County Community Development Agency  
415-499-7880

**City of Murrieta Development Code (J&W, UDS)** - Prepared a comprehensive Development Code, incorporating zoning, subdivision, and City-wide design guidelines into an integrated document.

Contact: Patti Nahill, Senior Planner  
City of Murrieta  
909-698-1040

**Placer County Zoning Ordinance (CMCA)** - Paul Crawford completed a reorganization and reformatting of the County's outdated Zoning Ordinance, including consolidation and redefinition of existing zoning districts, and the retention of some existing requirements and standards, all with extensive rewriting to improve clarity and understanding. The ordinance deals with land use and development in unincorporated urban communities and rural areas from the San Joaquin Valley floor to the Sierra around Lake Tahoe. The standards dealt with a range of issues from senior citizen housing projects within urban areas, to high-tech business parks, to ski resort facilities.

Contact: Fred Yeager, Planning Director  
Placer County Planning Department  
916-889-7470

**City of San Bernardino Development Code (J&W, UDS)** - Prepared comprehensive Development Code, incorporating zoning, subdivision, and City-wide design guidelines into an integrated, easy-to-use document. Hillside development and ridgeline protection were among the many issues addressed. The project received the National APA Outstanding Planning Award for Plan Implementation in 1992.

Contact: Valerie Ross, Principal Planner  
City of San Bernardino  
909-384-5057

**City of Stockton Development Code (J&W, UDS, CMCA)** - Preparing a comprehensive Development Code, incorporating zoning and subdivision regulations into an integrated document.

Contact: Dianne Keil Smith, Senior Planner  
City of Stockton  
209-937-8340

**Town of Truckee Development Code (CMCA, J&W, UDS)** - Preparing this High Sierra Town's first zoning and subdivision regulations, and design guidelines after its incorporation. The draft Code is currently being reviewed by the Planning Commission.

Contact: Tony Lashbrook, Community Development Director  
Town of Truckee  
916-582-7876

#### D. Advantages of Team

We believe that our team of professionals offers the City of Lodi an ideal combination of background and expertise for preparing all components of the Zoning Ordinance update. Our knowledge and experience will ensure that all documents produced will not only be of high technical quality, but are also designed to be "user-friendly", clear, practical, understandable, and easily administered. All team members have strong reputations for producing timely, high-quality work. We believe that our team offers the following advantages:

- Significant experience with the drafting and adoption of integrated zoning and subdivision ordinances, development codes, and other types of development regulations and associated public participation efforts. The City of San Bernardino Development Code, completed by Jacobson & Wack and UDS, received a national award from the American Planning Association, and team members have also received numerous awards from the California Chapter of the APA. These demonstrate our ability to create solutions to zoning and planning problems that are both innovative and practical.
- Extensive "hands on" experience with *all* levels of zoning and subdivision ordinance administration, ranging from answering zoning inquiries at the "front counter," to the processing of land use permit applications and preparation of staff reports, to division and department management. We have personally drafted zoning, subdivision, grading, and building ordinances, and then been responsible for the administration and enforcement of those regulations. We understand the wide array of day-to-day issues staff must address in ordinance administration, and the needs of the public for timely, accurate responses to their questions.

Besides our past experience, our work in zoning and subdivision ordinance administration is ongoing for several public agency clients. Therefore, our ordinance drafting reflects hands-on experience, and understanding of *current* needs and trends within planning and community development departments, and is not simply an academic or theoretical exercise based on working with codes at some point in the past.

- Acknowledged experience with successful public participation and outreach programs, including public workshops, publicity, and notice materials of all types.
- We regularly share our experiences with, and perspectives on zoning and subdivision ordinance preparation and administration through two professional development courses: *Redesigning the Zoning Ordinance*, at UC Davis Extension, and *Designing and Implementing Effective Zoning Ordinances*, at UCLA Extension.
- Our established, effective working relationships as a consultant team, developed from numerous previous projects, enable us to provide efficient and cost-effective services.
- Our emphasis on project principals actually drafting our zoning and subdivision ordinances and development codes, ensuring that our products reflect the most extensive experience and informed analysis.
- Our familiarity with Lodi as a result of Larry Mintier's work on the City's General Plan.
- Extensive technology resources and expertise, including GIS (Arc/Info, ArcView, and Atlas\*GIS), CAD and computer graphics, and internet website development. We have

prepared zoning maps for several communities, and have provided both CAD and GIS mapping for several counties. Paul Crawford is currently developing World Wide Web versions of Zoning Ordinances for the cities of Culver City, Diamond Bar, and soon Stockton, and is webmaster for the California Planning Roundtable and UC Merced University Community Concept Planning Process websites.