



Legislation Details (With Board Report)

**File #:** 23-514      **Name:** CSG and 4LEAF Agreements for Plan Review Services

**Type:** General Agenda Item      **Status:** Passed

**File created:** 6/6/2023      **In control:** Board of Supervisors

**On agenda:** 6/27/2023      **Final action:** 6/27/2023

**Title:** a. Approve two (2) Standard Agreements with CSG Consultants, Inc., and 4LEAF, Inc., to provide plan check/review and related services to the County of Monterey Housing and Community Development Department’s Building Services (RFQ #10888) for the initial term of three (3) years from July 1, 2023 through June 30, 2026, including the option to extend the Agreements for two (2) additional one (1) year periods in accordance with the terms and conditions of the Agreements, in aggregate total amount not to exceed \$200,000 annually for both Agreements; and  
b. Authorize the Contracts/Purchasing Officer to execute Agreements with CSG and 4LEAF and future amendments that do not significantly alter the scope of work or increase the approved Agreement amounts by more than ten percent (10%), subject to review and approval by County Counsel and the Auditor-Controller’s Office.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Board Report, 2. Attachment 1 - CSG Agreement, 3. Attachment 2 - 4LEAF Agreement, 4. Attachment 3 - RFQ #10888, 5. Completed Board Order Item No. 98

Date	Ver.	Action By	Action	Result
6/27/2023	1	Board of Supervisors		

a. Approve two (2) Standard Agreements with CSG Consultants, Inc., and 4LEAF, Inc., to provide plan check/review and related services to the County of Monterey Housing and Community Development Department’s Building Services (RFQ #10888) for the initial term of three (3) years from July 1, 2023 through June 30, 2026, including the option to extend the Agreements for two (2) additional one (1) year periods in accordance with the terms and conditions of the Agreements, in aggregate total amount not to exceed \$200,000 annually for both Agreements; and  
b. Authorize the Contracts/Purchasing Officer to execute Agreements with CSG and 4LEAF and future amendments that do not significantly alter the scope of work or increase the approved Agreement amounts by more than ten percent (10%), subject to review and approval by County Counsel and the Auditor-Controller’s Office.

**RECOMMENDATION:**

It is recommended that the Board of Supervisors:

a. Approve two (2) Standard Agreements with CSG Consultants, Inc., and 4LEAF, Inc., to provide plan check/review and related services to the County of Monterey Housing and Community Development Department’s Building Services (RFQ #10888) for the initial term of three (3) years from July 1, 2023 through June 30, 2026, including the option to extend the Agreements for two (2) additional one (1) year periods in accordance with the terms and conditions of the Agreements, in aggregate total amount not to exceed \$200,000 annually for both Agreements; and  
b. Authorize the Contracts/Purchasing Officer to execute Agreements with CSG and 4LEAF and future amendments that do not significantly alter the scope of work or increase the approved Agreement amounts by more than ten percent (10%), subject to review and approval by County Counsel and the Auditor-Controller’s Office.

Office.

SUMMARY/DISCUSSION:

The County of Monterey’s Housing and Community Development Department (HCD), formerly the Resource Management Agency (RMA), has established on-call agreements by prequalifying professional firms in specialized fields. The purpose of having on-call consultants is to expedite the procurement process when the department requires specialized services from a professional firm due to the volume of work or lack of internal expertise in those specialized areas. The County has a ministerial responsibility to review and permit most construction projects for compliance with State and local building regulations.

HCD - Building Services currently has an on-call agreement with CSG Consultants, Inc., for plan review services that is due to expire June 30, 2023. The agreement with CSG provides plan review and construction building inspection services on an “as-needed” basis. Due to the length of time for the current agreement with CSG, HCD determined it was necessary to issue a Request for Qualifications (RFQ). In early 2023, HCD - Building Services issued RFQ #10888 which resulted in the selection of two highly qualified firms: 1) CSG Consultants, Inc., and 2) 4LEAF, Inc. HCD has identified a need to have two (2) contractors available to provide on-call plan review and construction building inspection services.

As per RFQ #10888, the initial term of the agreements will be three (3) years with the ability to enter into two (2), one- (1-) year extensions. Each agreement will have a not to exceed amount of \$300,000 for the initial three- (3-) year period or \$100,000 per fiscal year per agreement.

OTHER AGENCY INVOLVEMENT:

The Office of the County Counsel and the Auditor-Controller’s Office have reviewed and approved the two (2) agreements as to form and legality, and fiscal provisions, respectively.

FINANCING:

Appropriations for services provided by CSG and 4LEAF under this Agreement are included in the FY2023-24 Recommended Budget. Funding for subsequent years will be included in the annual budget process. If no appropriations are included and augmentations are not authorized, there will be no expenditures unless HCD has increased revenues to cover the cost of services.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The recommended action supports the Board of Supervisors’ Strategic Initiatives by augmenting the County’s ability to respond to development projects that require technical review. The services provided by CSG and 4LEAF allow the County to provide services to the public in a timely manner.

- Economic Development
- Administration
- Health & Human Services
- Infrastructure
- Public Safety

Prepared by: Kathy Nielsen, Management Analyst II, x4832  
Reviewed by: Josh Bowling, Chief Building Services, x5227  
Reviewed by: Lori Woodle, Finance Manager I, x6682  
Approved by: Craig W. Spencer, Working out of Class as Director, HCD

The following attachments are on file with the Clerk of the Board:

Attachment 1 - CSG Agreement  
Attachment 2 - 4LEAF Agreement  
Attachment 3 - RFQ #10888