

PROFESSIONAL SERVICES AGREEMENT
[Environmental (CEQA) Services]

THIS PROFESSIONAL SERVICES AGREEMENT (the “Agreement”) is made at Orange, California, on this _____ day of _____, 2026 (the “Effective Date”) by and between the CITY OF ORANGE, a municipal corporation (“City”), and SAGECREST PLANNING AND ENVIRONMENTAL, a California corporation (“Contractor”), who agree as follows:

1. Services. Subject to the terms and conditions set forth in this Agreement, Contractor shall provide to the reasonable satisfaction of City the services set forth in Exhibit “A,” which is attached hereto and incorporated herein by reference. As a material inducement to City to enter into this Agreement, Contractor represents and warrants that it has thoroughly investigated and considered the scope of services and fully understands the difficulties and restrictions in performing the work. The services which are the subject of this Agreement are not in the usual course of City’s business and City relies on Contractor’s representation that it is independently engaged in the business of providing such services and is experienced in performing the work. Contractor shall perform all services in a manner reasonably satisfactory to City and in a manner in conformance with the standards of quality normally observed by an entity providing such services to a municipal agency. All services provided shall conform to all federal, state and local laws, rules and regulations and to the best professional standards and practices. The terms and conditions set forth in this Agreement shall control over any terms and conditions in Exhibit "A" to the contrary.

Hayden Beckman (“City’s Project Manager”), shall be the person to whom Contractor will report for the performance of services hereunder. It is understood that Contractor’s performance hereunder shall be under the supervision of City’s Project Manager (or his/her designee), that Contractor shall coordinate its services hereunder with City’s Project Manager to the extent required by City’s Project Manager, and that all performances required hereunder by Contractor shall be performed to the satisfaction of City’s Project Manager and the City Manager.

2. Compensation and Fees.

a. Contractor's total compensation for all services performed under this Agreement, shall not exceed ONE HUNDRED FIFTY THOUSAND DOLLARS and 00/100 (\$150,000.00) without the prior written authorization of City.

b. The above compensation shall include all costs, including, but not limited to, all clerical, administrative, overhead, insurance, reproduction, telephone, travel, auto rental, subsistence and all related expenses.

3. Payment.

a. As scheduled services are completed, Contractor shall submit to City an invoice for the services completed, authorized expenses and authorized extra work actually performed or incurred.

b. All such invoices shall state the basis for the amount invoiced, including services completed, the number of hours spent and any extra work performed.

c. City will pay Contractor the amount invoiced within thirty (30) days of receipt of all deliverables.

d. Payment shall constitute payment in full for all services, authorized costs and authorized extra work covered by that invoice.

4. **Change Orders.** No payment for extra services caused by a change in the scope or complexity of work, or for any other reason, shall be made unless and until such extra services and a price therefor have been previously authorized in writing and approved by City as an amendment to this Agreement. City's Project Manager is authorized to approve a reduction in the services to be performed and compensation therefor. All amendments shall set forth the changes of work, extension of time, and/or adjustment of the compensation to be paid by City to Contractor and shall be signed by the City's Project Manager, City Manager or City Council, as applicable.

5. **Licenses.** Contractor represents that it and any subcontractors it may engage, possess any and all licenses which are required under state or federal law to perform the work contemplated by this Agreement and that Contractor and its subcontractors shall maintain all appropriate licenses, including a City of Orange business license, at its cost, during the performance of this Agreement.

6. **Independent Contractor.** At all times during the term of this Agreement, Contractor shall be an independent contractor and not an employee of City. City shall have the right to control Contractor only insofar as the result of Contractor's services rendered pursuant to this Agreement. City shall not have the right to control the means by which Contractor accomplishes services rendered pursuant to this Agreement. Contractor shall, at its sole cost and expense, furnish all facilities, materials and equipment which may be required for furnishing services pursuant to this Agreement. Contractor shall be solely responsible for, and shall indemnify, defend and save City harmless from all matters relating to the payment of its subcontractors, agents and employees, including compliance with social security withholding and all other wages, salaries, benefits, taxes, exactions, and regulations of any nature whatsoever. Contractor acknowledges that it and any subcontractors, agents or employees employed by Contractor shall not, under any circumstances, be considered employees of City, and that they shall not be entitled to any of the benefits or rights afforded employees of City, including, but not limited to, sick leave, vacation leave, holiday pay, Public Employees Retirement System benefits, or health, life, dental, long-term disability or workers' compensation insurance benefits.

7. **Contractor Not Agent.** Except as City may specify in writing, Contractor shall have no authority, express or implied, to act on behalf of City in any capacity whatsoever as an agent. Contractor shall have no authority, express or implied, to bind City to any obligation whatsoever.

8. **Designated Persons.** Only those qualified persons authorized by City's Project Manager, or as designated in Exhibit "A," shall perform work provided for under this Agreement. It is understood by the parties that clerical and other nonprofessional work may be performed by persons other than those designated.

9. **Assignment or Subcontracting.** No assignment or subcontracting by Contractor of any part of this Agreement or of funds to be received under this Agreement shall be of any force or effect unless the assignment has the prior written approval of City. City may terminate this Agreement rather than accept any proposed assignment or subcontracting. Such assignment or subcontracting may be approved by the City Manager or his/her designee.

10. **Time of Completion.** Except as otherwise specified in Exhibit "A," Contractor shall commence the work provided for in this Agreement within five (5) days of the Effective Date of this Agreement and diligently prosecute completion of the work or as otherwise agreed to by and between the representatives of the parties.

11. **Time Is of the Essence.** Time is of the essence in this Agreement. Contractor shall do all things necessary and incidental to the prosecution of Contractor's work.

12. **Reserved.**

13. **Delays and Extensions of Time.** Contractor's sole remedy for delays outside its control, other than those delays caused by City, shall be an extension of time. No matter what the cause of the delay, Contractor must document any delay and request an extension of time in writing at the time of the delay to the satisfaction of City. Any extensions granted shall be limited to the length of the delay outside Contractor's control. If Contractor believes that delays caused by City will cause it to incur additional costs, it must specify, in writing, why the delay has caused additional costs to be incurred and the exact amount of such cost at the time the delay occurs. No additional costs can be paid that exceed the not to exceed amount stated in Section 2.a, above, absent a written amendment to this Agreement.

14. **Products of Contractor.** The documents, studies, evaluations, assessments, reports, plans, citations, materials, manuals, technical data, logs, files, designs and other products produced or provided by Contractor for this Agreement shall become the property of City upon receipt. Contractor shall deliver all such products to City prior to payment for same. City may use, reuse or otherwise utilize such products without restriction.

15. **Equal Employment Opportunity.** During the performance of this Agreement, Contractor agrees as follows:

a. Contractor shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, mental or physical disability, or any other basis prohibited by applicable law. Contractor shall ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, national origin, mental or physical disability, or any other basis prohibited by applicable law. Such actions shall include, but not be limited to the following: employment, upgrading, demotion

or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation and selection for training, including apprenticeship. Contractor agrees to post in conspicuous places, available to employees and applicants for employment, a notice setting forth provisions of this non-discrimination clause.

b. Contractor shall, in all solicitations and advertisements for employees placed by, or on behalf of Contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, mental or physical disability, or any other basis prohibited by applicable law.

c. Contractor shall cause the foregoing paragraphs (a) and (b) to be inserted in all subcontracts for any work covered by this Agreement, provided that the foregoing provisions shall not apply to subcontracts for standard commercial supplies or raw materials.

16. Conflicts of Interest. Contractor agrees that it shall not make, participate in the making, or in any way attempt to use its position as a consultant to influence any decision of City in which Contractor knows or has reason to know that Contractor, its officers, partners, or employees have a financial interest as defined in Section 87103 of the Government Code.

17. Indemnity.

a. To the fullest extent permitted by law, Contractor agrees to indemnify, defend and hold City, its City Council and each member thereof, and the officers, officials, agents and employees of City (collectively the "Indemnitees") entirely harmless from all liability arising out of:

(1) Any and all claims under workers' compensation acts and other employee benefit acts with respect to Contractor's employees or Contractor's subcontractor's employees arising out of Contractor's work under this Agreement, including any and all claims under any law pertaining to Contractor or its employees' status as an independent contractor and any and all claims under Labor Code section 1720 related to the payment of prevailing wages for public works projects; and

(2) Any claim, loss, injury to or death of persons or damage to property caused by any act, neglect, default, or omission of Contractor, or person, firm or corporation employed by Contractor, either directly or by independent contract, including all damages due to loss or theft sustained by any person, firm or corporation including the Indemnitees, or any of them, arising out of, or in any way connected with the work or services which are the subject of this Agreement, including injury or damage either on or off City's property; but not for any loss, injury, death or damage caused by the active negligence or willful misconduct of City. Contractor, at its own expense, cost and risk, shall indemnify any and all claims, actions, suits or other proceedings that may be brought or instituted against the Indemnitees on any such claim or liability covered by this subparagraph, and shall pay or satisfy any judgment that may be rendered against the Indemnitees, or any of them, in any action, suit or other proceedings as a result of coverage under this subparagraph.

b. To the fullest extent permitted by law, and as limited by California Civil Code 2782.8, Contractor agrees to indemnify and hold Indemnitees harmless from all liability arising out of any claim, loss, injury to or death of persons or damage to property to the extent caused by its negligent professional act or omission in the performance of professional services pursuant to this Agreement.

c. Except for the Indemnitees, the indemnifications provided in this Agreement shall not be construed to extend any third party indemnification rights of any kind to any person or entity which is not a signatory to this Agreement.

d. The indemnities set forth in this section shall survive any closing, rescission, or termination of this Agreement, and shall continue to be binding and in full force and effect in perpetuity with respect to Contractor and its successors.

18. Insurance.

a. Contractor shall carry workers' compensation insurance as required by law for the protection of its employees during the progress of the work. Contractor understands that it is an independent contractor and not entitled to any workers' compensation benefits under any City program.

b. Contractor shall maintain during the life of this Agreement the following minimum amount of comprehensive general liability insurance or commercial general liability insurance: the greater of (1) One Million Dollars (\$1,000,000) per occurrence; or (2) all the insurance coverage and/or limits carried by or available to Contractor. Said insurance shall cover bodily injury, death and property damage and be written on an occurrence basis.

c. Contractor shall maintain during the life of this Agreement, the following minimum amount of automotive liability insurance: the greater of (1) a combined single limit of One Million Dollars (\$1,000,000); or (2) all the insurance coverage and/or limits carried by or available to Contractor. Said insurance shall cover bodily injury, death and property damage for all owned, non-owned and hired vehicles and be written on an occurrence basis.

d. Any insurance proceeds in excess of or broader than the minimum required coverage and/or minimum required limits which are applicable to a given loss shall be available to City. No representation is made that the minimum insurance requirements of this Agreement are sufficient to cover the obligations of Contractor under this Agreement.

e. Each policy of general liability and automotive liability shall provide that City, its officers, officials, agents, and employees are declared to be additional insureds under the terms of the policy, but only with respect to the work performed by Contractor under this Agreement. A policy endorsement to that effect shall be provided to City along with the certificate of insurance. In lieu of an endorsement, City will accept a copy of the policy(ies) which evidences that City is an additional insured as a contracting party. The minimum coverage required by Subsection 18.b and c, above, shall apply to City as an additional insured. Any umbrella liability

insurance that is provided as part of the general or automobile liability minimums set forth herein shall be maintained for the duration of the Agreement.

f. Contractor shall maintain during the life of this Agreement professional liability insurance covering errors and omissions arising out of the performance of this Agreement with a minimum limit of One Million Dollars (\$1,000,000) per claim. Contractor agrees to keep such policy in force and effect for at least five (5) years from the date of completion of this Agreement.

g. The insurance policies maintained by Contractor shall be primary insurance and no insurance held or owned by City shall be called upon to cover any loss under the policy. Contractor will determine its own needs in procurement of insurance to cover liabilities other than as stated above.

h. Before Contractor performs any work or prepares or delivers any materials, Contractor shall furnish certificates of insurance and endorsements, as required by City, evidencing the aforementioned minimum insurance coverages on forms acceptable to City, which shall provide that the insurance in force will not be canceled or allowed to lapse without at least ten (10) days' prior written notice to City.

i. Except for professional liability insurance coverage that may be required by this Agreement, all insurance maintained by Contractor shall be issued by companies admitted to conduct the pertinent line of insurance business in California and having a rating of Grade A or better and Class VII or better by the latest edition of Best Key Rating Guide. In the case of professional liability insurance coverage, such coverage shall be issued by companies either licensed or admitted to conduct business in California so long as such insurer possesses the aforementioned Best rating.

j. Contractor shall immediately notify City if any required insurance lapses or is otherwise modified and cease performance of this Agreement unless otherwise directed by City. In such a case, City may procure insurance or self-insure the risk and charge Contractor for such costs and any and all damages resulting therefrom, by way of set-off from any sums owed Contractor.

k. Contractor agrees that in the event of loss due to any of the perils for which it has agreed to provide insurance, Contractor shall look solely to its insurance for recovery. Contractor hereby grants to City, on behalf of any insurer providing insurance to either Contractor or City with respect to the services of Contractor herein, a waiver of any right to subrogation which any such insurer may acquire against City by virtue of the payment of any loss under such insurance.

l. Contractor shall include all subcontractors, if any, as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor to City for review and approval. All coverages for subcontractors shall be subject to all of the requirements stated herein.

19. Termination. City may for any reason terminate this Agreement by giving Contractor not less than five (5) days' written notice of intent to terminate. Upon receipt of such notice, Contractor shall immediately cease work, unless the notice from City provides otherwise. Upon the termination of this Agreement, City shall pay Contractor for services satisfactorily provided and all allowable reimbursements incurred to the date of termination in compliance with this Agreement, unless termination by City shall be for cause, in which event City may withhold any disputed compensation. City shall not be liable for any claim of lost profits.

20. Maintenance and Inspection of Records. In accordance with generally accepted accounting principles, Contractor and its subcontractors shall maintain reasonably full and complete books, documents, papers, accounting records, and other information (collectively, the "records") pertaining to the costs of and completion of services performed under this Agreement. City and its authorized representatives shall have access to and the right to audit and reproduce any of Contractor's records regarding the services provided under this Agreement. Contractor shall maintain all such records for a period of at least three (3) years after termination or completion of this Agreement. Contractor agrees to make available all such records for inspection or audit at its offices during normal business hours and upon three (3) days' notice from City, and copies thereof shall be furnished if requested.

21. Compliance with all Laws/Immigration Laws.

a. Contractor shall be knowledgeable of and comply with all local, state and federal laws which may apply to the performance of this Agreement.

b. If the work provided for in this Agreement constitutes a "public works," as that term is defined in Section 1720 of the California Labor Code, for which prevailing wages must be paid, to the extent Contractor's employees will perform any work that falls within any of the classifications for which the Department of Labor Relations of the State of California promulgates prevailing wage determinations, Contractor hereby agrees that it, and any subcontractor under it, shall pay not less than the specified prevailing rates of wages to all such workers. The general prevailing wage determinations for crafts can be located on the website of the Department of Industrial Relations (www.dir.ca.gov/DLSR). Additionally, to perform work under this Contract, Contractor must meet all State registration requirements and criteria, including project compliance monitoring.

c. Contractor represents and warrants that it:

(1) Has complied and shall at all times during the term of this Agreement comply, in all respects, with all immigration laws, regulations, statutes, rules, codes, and orders, including, without limitation, the Immigration Reform and Control Act of 1986 (IRCA); and

(2) Has not and will not knowingly employ any individual to perform services under this Agreement who is ineligible to work in the United States or under the terms of this Agreement; and

(3) Has properly maintained, and shall at all times during the term of this Agreement properly maintain, all related employment documentation records including, without limitation, the completion and maintenance of the Form I-9 for each of Contractor's employees; and

(4) Has responded, and shall at all times during the term of this Agreement respond, in a timely fashion to any government inspection requests relating to immigration law compliance and/or Form I-9 compliance and/or worksite enforcement by the Department of Homeland Security, the Department of Labor, or the Social Security Administration.

d. Contractor shall require all subcontractors or subconsultants to make the same representations and warranties as set forth in Subsection 21.c.

e. Contractor shall, upon request of City, provide a list of all employees working under this Agreement and shall provide, to the reasonable satisfaction of City, verification that all such employees are eligible to work in the United States. All costs associated with such verification shall be borne by Contractor. Once such request has been made, Contractor may not change employees working under this Agreement without written notice to City, accompanied by the verification required herein for such employees.

f. Contractor shall require all subcontractors or sub-consultants to make the same verification as set forth in Subsection 21.e.

g. If Contractor or subcontractor knowingly employs an employee providing work under this Agreement who is not authorized to work in the United States, and/or fails to follow federal laws to determine the status of such employee, that shall constitute a material breach of this Agreement and may be cause for immediate termination of this Agreement by City.

h. Contractor agrees to indemnify and hold City, its officers, officials, agents and employees harmless for, of and from any loss, including but not limited to fines, penalties and corrective measures City may sustain by reason of Contractor's failure to comply with said laws, rules and regulations in connection with the performance of this Agreement.

22. Governing Law and Venue. This Agreement shall be construed in accordance with and governed by the laws of the State of California and Contractor agrees to submit to the jurisdiction of California courts. Venue for any dispute arising under this Agreement shall be in Orange County, California.

23. Integration. This Agreement constitutes the entire agreement of the parties. No other agreement, oral or written, pertaining to the work to be performed under this Agreement shall be of any force or effect unless it is in writing and signed by both parties. Any work performed which is inconsistent with or in violation of the provisions of this Agreement shall not be compensated.

24. Notice. Except as otherwise provided herein, all notices required under this Agreement shall be in writing and delivered personally, by e-mail, or by first class U.S. mail, postage prepaid, to each party at the address listed below. Either party may change the notice address by notifying the other party in writing. Notices shall be deemed received upon receipt of same or within three (3) days of deposit in the U.S. Mail, whichever is earlier. Notices sent by e-mail shall be deemed received on the date of the e-mail transmission.

“CONTRACTOR”

Sagecrest Planning and Environmental
27128 Paseo Espada, Suite 1524
San Juan Capistrano, CA 92675
Attn.: Amy Vazquez

Telephone: (714) 783-1863 x705
E-Mail: avazquez@sagecrestplanning.com

“CITY”

City of Orange
300 E. Chapman Avenue
Orange, CA 92866-1591
Attn.: Hayden Beckman

Telephone: (714) 744-7229
E-Mail: hbeckman@cityoforange.org

25. Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. Signatures transmitted electronically shall have the same effect as original signatures.

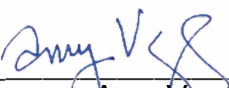
[Remainder of page intentionally left blank; signatures on next page]

IN WITNESS of this Agreement, the parties have entered into this Agreement as of the year and day first above written.

“CONTRACTOR”

SAGECREST PLANNING AND
ENVIRONMENTAL, a California corporation

*By: 
Printed Name: Amy Vazquez
Title: President

*By: 
Printed Name: Amy Vazquez
Title: Secretary

“CITY”

CITY OF ORANGE, a municipal corporation

By: _____
Daniel R. Slater, Mayor

ATTEST:

Pamela Coleman, City Clerk

APPROVED AS TO FORM:

Connor Hyland
Senior Assistant City Attorney

***NOTE:**

- City requires the following signature(s) on behalf of the Contractor:
(1) the Chairman of the Board, the President or a Vice-President, AND (2) the Secretary, the Chief Financial Officer, the Treasurer, an Assistant Secretary or an Assistant Treasurer. If only one corporate officer exists or one corporate officer holds more than one corporate office, please so indicate. OR
- The corporate officer named in a corporate resolution as authorized to enter into this Agreement. A copy of the corporate resolution, certified by the Secretary close in time to the execution of the Agreement, must be provided to City.

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EXHIBIT “A”

SCOPE OF SERVICES

[Beneath this sheet.]



SAGECREST

PLANNING + ENVIRONMENTAL

PROPOSAL FOR ON-CALL ENVIRONMENTAL SERVICES

City of Orange

PREPARED BY

Amy Vazquez, President
avazquez@sagecrestplanning.com

949.996.SAGE (7243)
www.sagecrestplanning.com
27128 Paseo Espada, Suite 1524, San Juan Capistrano, CA 92675



SAGECREST
PLANNING + ENVIRONMENTAL

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ATTACHMENT A - RESUMES



SAGECREST
PLANNING + ENVIRONMENTAL

June 10, 2026

City of Orange
Michelle Dulalia, Administrative Analyst
Community Development
300 E. Chapman Ave.
Orange, CA 92866

SUBJECT: QUALIFICATIONS FOR ON-CALL ENVIRONMENTAL SERVICES

Sagecrest Planning + Environmental (Sagecrest) is pleased to submit this proposal to the City of Orange (City) to provide on-call environmental services on a task order basis.

Sagecrest is a local Southern California-based firm located at 27128 Paseo Espada, Suite 1524, San Juan Capistrano, CA, 92675. Sagecrest specializes in the preparation of environmental documents for projects in compliance with CEQA. The Sagecrest environmental planning team, together with our subconsultant technical experts, perform professional consulting services for the analysis of discretionary projects for private development and public agency-initiated capital improvement projects, plans, and programs. The Sagecrest team has prepared and peer reviewed numerous CEQA documents on behalf of our Lead Agency clients.

Sagecrest will coordinate with City staff to ensure all Sagecrest planners and our subconsultant technical experts have the appropriate level of experience for the complexity of projects and tasks assigned. Sagecrest has partnered with RK Engineering and South Environmental to prepare required environmental technical studies (e.g. biological resources, air quality, greenhouse gas, transportation/traffic analysis, cultural and historic resources).

Sagecrest looks forward to your favorable review of our team's qualifications and scope of work. If you require additional information or would like to further discuss our qualifications, please contact me at 714.914.5605 or via email at avazquez@sagecrestplanning.com.

Respectfully,

Amy Vazquez, President



SAGECREST
PLANNING + ENVIRONMENTAL

COMPANY INFORMATION

Background

Sagecrest has experience in a broad range of land use planning, development activities, and California Environmental Quality Act (CEQA) compliance. Our team is comprised of a diverse group of planners and professionals with expertise in urban planning and design, environmental planning, public policy, and project management. Our team is recognized for our collaborative and insightful approach that results in high quality work and proven results.

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Sagecrest Planning + Environmental is an S-Corporation, in the state of California, solely owned by Amy Vazquez. We have been operating under this business name since February 28th, 2017. Our Federal Employer I.D. number is 30-1218415. Sagecrest will manage projects from our San Juan Capistrano office located at 27128 Paseo Espada, Suite 1524, San Juan Capistrano, California 92675.

Sagecrest is qualified to prepare CEQA/NEPA documents, including initial studies, exemptions, negative declarations, mitigated negative declarations, environmental impact reports, associated technical studies (i.e. air quality, biology, cultural resources, noise), and all related notices and filings. Sagecrest understands the requested CEQA/Environmental Services may include, but are not limited to the following:

- Peer Reviews of Environmental Documents from outside agencies and technical studies from applicants
- Initial Studies/ Mitigated Negative Declarations (IS/MND)
- Environmental Impact Reports (EIRs)
- Addenda to EIRs and IS/MNDs
- Checklists to support the use of a previously certified EIR or previously approved IS/MND
- Checklists to Support Categorical Exemptions, Class 32 Infill Exemptions, or any Streamlining Exemptions pursuant to 15182-15183.3 of the CEQA Guidelines
- Technical Studies in support of EIRs, IS/MNDs, and Exemptions
- Health Risk Assessments and Noise Analysis of the surrounding environment's impact on a proposed project, not otherwise required by CEQA
- Mitigation Monitoring and Reporting Programs
- Preparation of environmental documentation for City-initiated projects
- Public Notices
- Provision of expert technical testimony before decision making bodies



The Sagecrest team offers a comprehensive understanding of key issues central to environmental analysis, including regulatory compliance, resource protection, community impacts, and long-term sustainability considerations. Our team has extensive experience preparing and reviewing environmental documents in compliance with the California Environmental Quality Act (CEQA) statute, guidelines, and relevant case law to ensure legally defensible analysis, as well as the full range of state, federal, and local regulations that govern environmental review. Our work regularly involves coordination with state agencies such as the California Coastal Commission, Department of Fish and Wildlife, and regional air and water quality districts, as well as federal compliance under NEPA, the Endangered Species Act, the Clean Water Act, and Section 106.

This combination of technical expertise and familiarity enables us to anticipate challenges, streamline the review process, and deliver environmental analyses that support informed decision-making and resilient project outcomes.

Unique Qualities

Sagecrest's background in providing both current and long-range planning services to municipalities positions our team to have a practical and comprehensive understanding of how local general plans, zoning ordinances, municipal codes, and jurisdiction-specific thresholds of significance shape environmental review. This enables us to produce documents that meet regulatory requirements while aligning with local expectations and decision-making practices.

UNDERSTANDING & APPROACH

Approach & Work Plan

As part of preparing CEQA/NEPA documents, Sagecrest provides efficient and effective on-call environmental review services. Sagecrest takes the following approach to provide environmental services.

- We actively assist the City in implementing and complying with the provisions of CEQA and the local guidelines
- Sagecrest prepares accurate, clear, concise, and legally defensible environmental documents in accordance with CEQA, such as initial studies, mitigated/negative declarations, environmental impact reports (EIRs), addenda to prior environmental documents, subsequent/supplemental EIRs, responses to comments/Final EIRs, mitigation measures, mitigation monitoring and reporting programs, notices and exemptions
- We complete all tasks associated with preparation of environmental documents including preparation, circulation, and filing/recordation of documents and notices in accordance with CEQA and within specified timelines



- Sagecrest proactively meets and/or communicates with the City's staff and applicants regarding environmental review procedures and environmental issues related to the project
- We conduct Site inspections for compliance with CEQA
- Sagecrest provides advice and technical assistance pertaining to compliance with State and Federal Regulations
- Sagecrest takes pride in our Project Management of Environmental Review as an extension of Lead Agency Staff

Schedule & Timeline Management

Sagecrest manages documents through a series of folders that correspond to task deliverables for technical studies, Screencheck, Proofcheck, Print Check, and Public Review versions, as well as all required notices. Sagecrest shares draft documents with the City through a dedicated Dropbox link and tracks changes in Microsoft Word. The Environmental Services team meets twice weekly to track progress on work products and resolve potential issues as they arise.

The Project Manager manages the subconsultant team through regular communication to ensure deadlines and deliverables are met. All work product from the subconsultants is reviewed by the Project Manager or technical editor prior to City submittal.

- Verifies consistent formatting, fonts, and styles
- Confirms proper use of images, graphs, and other visual elements
- Grammar and language check

Communication & Coordination

The Sagecrest team not only has experience as environmental planners, but also as municipal agency staff, which gives us insight into the interdisciplinary coordination required to deliver service that implements city procedures and operations. We take pride in blending in seamlessly as an extension of lead agency planning staff.

Communication is key to ensuring a project's success. Sagecrest Project Managers maintain regular communication with the Client via phone and email, as well as through regular project meetings. Sagecrest staff will always return emails or phone calls within 24 hours.

Sagecrest manages the expectations of all parties involved with a clear and comprehensive scope of work and schedule. The Project Manager communicates regularly with the City, Applicant, and subconsultants to identify any potential issues or delays and works hard to minimize their potential impact to the schedule. Sagecrest strives to provide objective analysis while responding to the priorities and pressures experienced by all parties involved in bringing a development project to fruition.



SAGECREST
PLANNING + ENVIRONMENTAL

Sagecrest Planning + Environmental Team

The following is a partial list of key personnel to provide as needed professional environmental review services for the City. All proposed team members work in our Orange County office in San Juan Capistrano, CA and are properly licensed to practice in California. Detailed resumes of all team members including relevant education, licenses, certifications and experience, are provided as Attachment A.

AMY VAZQUEZ, PRESIDENT

Bachelor of Arts, Urban Studies

FEBRUARY 2017

University of California, Irvine



Amy has been a professional planner since 1999 and is the Owner and President of Sagecrest Planning + Environmental. She is a practiced planner who has experience successfully managing large and controversial planning projects throughout California.

Amy will serve as the representative responsible for all contract matters and negotiations through project completion.

LINDSAY ORTEGA, AICP, VICE PRESIDENT

Master of Urban and Regional Planning
Bachelor of Arts, Political Science
Minor in Public Affairs

NOVEMBER 2017

University of California, Irvine
University of California, Los Angeles



Lindsay is a certified planner and has worked in the areas of planning, development, marketing, and community outreach since 2006. Lindsay has extensive project management experience and leads a team of experienced project planners responsible for managing and processing a variety of advanced planning projects, environmental documents, and project entitlements.

Lindsay will serve as the Primary Project Manager for this contract, including coordination of CEQA/NEPA documents and assigning City tasks to planners.



SAGECREST
PLANNING + ENVIRONMENTAL

Lindsay Ortega – Relevant Project Experience

Rancho Ridge Infill Residential Project Section 15183 Exemption, City of Orange (In Process)
SALT Residential Development, EIR, City of Anaheim (In Process)
Adesa Rialto Food Processing Facility, IS/MND, City of Rialto (In Process)
Haven Winery IS/MND, County of Riverside (2026)
Monte Vista Palmdale Residential Development, Section 15183 Exemption, City of Palmdale (2026)
Toll Brothers Residential Development Class 32 Infill Exemption, City of Laguna Hills (2026)
Brandywine Homes Santa Barbara Towns Development IS/MND, City of Garden Grove (2025)
Pauling Industrial Development Class 32 In-Fill Exemption (2025)
City of Perris General Plan Housing Element Implementation IS/MND (2025)
San Juan Plaza Class 32 In-Fill Exemption Peer Review (2024)
Camino Twelve Townhomes Project Class 32 Infill-Exemption Peer Review (2024)
Brandywine Homes Route 66 Residential Development IS/MND, City of Glendora (2024)
Brandywine Homes Dale Residential Development IS/MND, City of Buena Park (2024)
Lincoln Colony Apartments, IS/MND, City of Anaheim (2022)
MB Durian Industrial Development, Class 32 In-fill Exemption, City of Fontana (2022)
Sunrise Senior Living Long Beach, Class 32 In-Fill Exemption, City of Long Beach (2021)
Sunrise Senior Living, Oceanside IS/MND, City of Oceanside (2021)
Anaheim 1600 W Lincoln ISMND, City of Anaheim (2021)
Sunrise Senior Living, Class 32 In-fill Exemption, City of Orange (2019)

KELLY RIBUFFO, SENIOR PROJECT MANAGER

Master of Historic Preservation
Bachelor of Arts, Anthropology and Asian Studies

JUNE 2022

University of Oregon
University of Florida



Kelly has worked in the areas of current planning and historic preservation since 2011. As a public sector planner in Florida and California she has extensive experience processing a variety of complex entitlement and environmental projects. Kelly also specializes in historic preservation design review for 19th and 20th century historic resources. She has a Master of Science in Historic Preservation from the University of Oregon. She also meets the Secretary of Interior's Professional Qualification Standards in the disciplines of History and Architectural History.

Kelly will provide services related to environmental document writing and historic preservation expertise.



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Kelly Ribuffo – Relevant Project Experience

Haven Winery IS/MND, County of Riverside (2026)

Mountain View Residential IS/MND Peer Review, City of Santa Ana (2026)

Highgrove Residential IS/MND, County of Riverside (2024)

Brown Strauss Steel Distribution IS/MND, City of Banning (2024)

KB Home Sunkist Residential Development Appendix N Checklist, City of Anaheim (2023)

Evergreen Commercial Development ISMND, City of Lake Elsinore (2022)

Magnolia Flats Appendix N Streamlining Checklist (2022)

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JACKIE TRAN, PROJECT MANAGER

JUNE 2024

Bachelor of Arts, Urban Studies

University of California, Irvine



Jackie is a planner with experience in both the public and private sector. She specializes in environmental technical documents, including Categorical Exemptions, Phase I ESAs, Air Quality, Greenhouse Gas, Noise, and Energy, under CEQA/NEPA for a variety of planning projects involving residential, redevelopment, infrastructure, and commercial uses. Her work focuses on existing conditions analysis, regulatory compliance, and community outreach. She has also worked on long-range comprehensive planning projects, including General Plan updates, specific plans, and development code amendments as well as entitlement and construction documents processing. Jackie is a strong technical writer and has task managed environmental technical documents and long-range planning projects.

Jackie's primary role will serve as the lead CEQA document writer, specializing in Hazard Mitigation, Phase I ESAs, Air Quality, Greenhouse Gas, Noise, and Energy.



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Jackie Tran – Relevant Project Experience

SALT Residential Development, EIR, City of Anaheim (In Process)
Toll Brothers Synagogue Residential Development, Section 15183 Exemption, City of Irvine (In Process)
Westcore Sorrento Industrial Development, EIR Addendum, City of San Diego (In Process)
Adesa Rialto Food Processing Facility, IS/MND, City of Rialto (In Process)
Rancho Ridge Infill Residential Project Section 15183 Exemption, City of Orange (In Process)
Haven Winery IS/MND, County of Riverside (2026)
Monte Vista Palmdale Residential Development, Section 15183 Exemption, City of Palmdale (2026)
Anaheim Porsche, Class 32 Infill Exemption, City of Anaheim (2026)
Toll Brothers Residential Development Class 32 Infill Exemption, City of Laguna Hills (2026)
Brandywine Homes Santa Barbara Towns Development IS/MND, City of Garden Grove (2025)
Hemet Dosner Farms Technical Study Peer Review, City of Hemet (2025)
City of Perris General Plan Housing Element Implementation IS/MND (2025)
Pauling Industrial Development, Class 32 In-Fill Exemption, City of Lake Forest (2025)
San Juan Plaza, Class 32 In-Fill Exemption Peer Review, City of San Juan Capistrano (2024)

KADEN LIKINS, ASSISTANT PLANNER

APRIL 2024

Bachelor of Arts, Urban Studies and Planning
Minor, Climate Change Studies

University of California, San Diego



Kaden is a dedicated planner working with our Development, Environmental and Planning Services teams. His passion for climate adaptivity led him to the City of San Diego's Bioregional Center where he was responsible for coordinating policy decisions, planning improvements, and sustainability across multiple departments within the jurisdiction. Kaden is talented environmental writer and will support the team with research, document preparation, and graphic creation.

Kaden supports the team with document setup, preparation, GIS Mapping, and graphic creation.



Kaden Likins – Relevant Project Experience

Rancho Ridge Infill Residential Project Section 15183 Exemption, City of Orange (In Process)

Monte Vista Palmdale Residential Development, Class 32 Infill Exemption, City of Palmdale (2026)

Toll Brothers Residential Development Class 32 Infill Exemption, City of Laguna Hills (2026)

Brandywine Homes Residential ISMND, City of Garden Grove (2025)

Brandywine Homes Route 66 Residential Development IS/MND, City of Glendora (2024)

Brandywine Homes Dale Residential Development IS/MND, City of Buena Park (2024)

EMILY TRAGOS, OPERATIONS MANAGER

JULY 2022

Bachelor of Arts, Communications
Minor, Public Relations

California State University, Fullerton



Emily has worked in marketing, creative services, event planning, and account management since 1995. She supports the management team with administrative duties, quality, and editorial control reviews, and manages all aspects of electronic and print deliverables. Emily will support the consultant team through quality control review and copy editing of draft documents to ensure consistency across all documents.

Emily will support the consultant team through quality control review and copy editing of draft documents to ensure consistency across all documents.

Subconsultants

Sagecrest partners with RK Engineering and South Environmental to prepare required environmental technical studies (e.g. biological resources, air quality, greenhouse gas, transportation/traffic analysis, cultural and historic resources). The following are key personnel for RK Engineering and South Environmental.

RK Engineering (Transportation, Noise, Air Quality, Green Gas Emissions, Energy)

RK Engineering uniquely combines engineering expertise and professionalism with creative thinking and innovative problem solving. The result is an extraordinary transportation engineering firm that possesses requisite expertise as well as the ability to look across disciplinary boundaries for solutions others may overlook.

This innovative approach is evident by the breadth of services available to RK Engineering diverse clientele that includes regional governments, counties, cities, special districts, school districts, community associations, private developers and contractors,



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engineering and planning firms. Each client receives what RK Engineering is known for on time, on target, on budget professional service.

RK Engineering staff represent more than 70 years of cumulative experience in traffic engineering and related disciplines.

Beyond this experience, RK Engineering personnel are recognized leaders in the fields of transportation planning, traffic impact analysis, circulation planning, multi-modal planning, parking studies, and environmental engineering. The combination of this experience and expertise means that major program assignments and small technical studies are all successfully completed to the satisfaction of RK Engineering clientele.

Perhaps the best measure of a firm's capabilities is the quality of the clientele it attracts. RK Engineering is pleased to count among its satisfied clientele, the Orange County Transportation Authority, and the Transportation Corridor Agencies as well as the counties of Orange and Riverside. Municipal clients have included the cities of Canyon Lakes, Huntington Beach, Irvine, Laguna Hills, Mammoth, Mission Viejo, Moreno Valley, Murrieta, Newport Beach, Perris, Rancho Santa Margarita, and San Juan Capistrano. Institutional clientele has included a range of school districts as well as respected institutions like the University of California, Irvine; Pomona College, Western State University College of Law, and California Baptist College. Community Association clients include the CZ Master Association in Coto de Caza, Aliso Viejo Community Association and numerous other associations.

BRYAN ESTRADA, AICP, PTP, PRINCIPAL

Bachelor of Arts, Urban Studies

2007

University of California, Irvine



As Principal at RK Engineering, Bryan oversees the Environmental Department and provides Air Quality, Greenhouse Gas, Noise, and Energy Conservation consulting services. Bryan also oversees Transportation Planning projects and has led RK's effort to be at the forefront of offering Vehicle Miles Traveled modeling services.

Bryan's experience includes traffic engineering and transportation planning, air quality and greenhouse gas analysis, and environmental acoustics and noise analyses. He has also contributed to the design of traffic signals, signing and striping plans and traffic control plans. Bryan frequently engaged with clients and developers, local government agencies, and community groups to help craft innovative solutions to mitigate traffic, noise and air quality impacts.



Bryan Estrada – Areas of Expertise

Transportation Planning
Traffic Engineering
Traffic Impact Studies
Traffic Calming
Parking
Vehicle Miles Traveled
Active Transportation & Bicycle Planning
Air Quality Emissions
Greenhouse Gas and Global Climate Change
Acoustical Engineering
Noise & Vibration Impact Studies
Energy Conservation

South Environmental (Biological Resources & Cultural Resources)

Founded in 2018 in Pasadena, California, South Environmental is a certified Disadvantaged Business Enterprise (DBE), Woman-Owned Business Enterprise (WBE), and Small Business Enterprise (SBE) specializing in natural and cultural resources consulting in Southern California. South Environmental provides architectural history, archaeology, biology, arboricultural, and paleontological resources consulting services.

Established as a partnership between Cultural Resources Director Samantha Murray and Principal Biologist Matthew South, the in-house team of specialists provides the full suite of cultural, paleontological, and natural resources compliance services. South Environmental assists clients navigate federal, state, and local regulatory and permitting processes, from small-scale private development projects to large-scale infrastructure and energy projects. They provide technical studies and compliance documentation to satisfy the regulatory requirements of the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA) and work closely with federal and state permitting agencies such as the U.S. Army Corps of Engineers (USACE), California Department of Fish and Wildlife (CDFW), and the State Regional Water Quality Control Board (RWQCB).

South Environmental uses the latest technologies and best science available to further the conservation and preservation of natural, cultural, and paleontological resources in California while helping our clients obtain their project goals and objectives. The firm assists with the planning and implementation of projects dedicated to the preservation and conservation of California's natural areas and rare species. We offer the following major service categories:



Cultural Resources Services

Includes architectural history and historic built environment resource significance evaluations, historic preservation, stakeholder engagement, historic context statements, intensive-level archaeological surveys and technical reports, and tribal cultural resources services.

Natural Resources Services

Preparation of biological resource assessments and impacts analyses, wetland delineations, special-status species surveys, and conservation planning. We also offer arborist services including tree inventories, surveys, risk assessments, and tree permitting services.

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Paleontological Resources Services

Includes paleontological resource assessments, surveys, and construction monitoring, as well as fossil salvage, identification, preparation, and curation.

GIS and Data Science Services

Includes database construction and management, mobile data collection, mapping, web applications, and spatial data creation and analysis.

SAMANTHA MURRAY, MA, RPA, CULTURAL RESOURCES DIRECTOR

2013

Master of Anthropology
Bachelor of Arts, Anthropology

California State University, Los Angeles
California State University, Northridge



Samantha is the cultural resources director and archaeological principal investigator at South Environmental with over 18 years' experience in all elements of cultural resources management, including project management, archaeology and architectural history studies, and significance evaluations. Ms. Murray has conducted thousands of Phase I archaeological studies, historical resource evaluations, and has developed detailed historic context statements for a multitude of property types and architectural styles.

Samatha Murray – Areas of Expertise

CEQA, NEPA, and Section 106 of the NHPA compliance documentation in consideration of impacts to historical, archaeological, and tribal cultural resources, and historic properties

Resource significance evaluations in consideration of NRHP, CRHR, and local designation criteria

Project design review for conformance with the Secretary of the Interior's Standards
Assistance with complex mitigation including HABS/HAER/HALS, salvage, and interpretive displays



EXPERIENCE & REFERENCES

Relevant Experience

Sagecrest has served local public agencies on environmental and development projects in communities across California in Los Angeles, Orange, San Diego, Riverside, and San Bernardino Counties for the past 9 years. The Environmental Services Team also has experience working as municipal agency staff, which gives us insight into the interdisciplinary coordination required to deliver environmental reviews that other consulting firms may not have.

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Sagecrest is under contract with several jurisdictions to provide environmental review services on an as-needed basis. The following table provides descriptions of our current on-call environmental services contracts.

TERM	TYPE OF CONTRACT	CONTRACTING AGENCY/CLIENT	PROJECT MANAGER
November 2017 – Current	On-call environmental services	City of Santa Ana	Ali Pezeshkpour, AICP Planning Manager
August 2019 – Current	On-call environmental services	City of Riverside	Brian Norton Principal Planner
March 2018 – Current	On-call environmental services	City of Lake Elsinore	Damaris Abraham Planning Manager
June 2021 – Current	On-call environmental services	City of Artesia	Melissa Burke Deputy City Manager
October 2021 – Current	On-call environmental services	City of Lake Forest	Amy Stonich, AICP Assistant Director of Community Development
August 2022 – Current	On-call environmental services	City of Laguna Beach	David Contreras Director Community Development
December 2022 – Current	On-call environmental services	City of San Juan Capistrano	Laura Stokes Principal Planner
September 2024 – Current	On-call environmental services	City of Santa Fe Springs	Cuong Nguyen Director of Community Development
June 2017 – Current	On-call environmental services	City of San Clemente	Zach Rehm Acting City Planner



Sample Work Projects

The team at Sagecrest includes a collaboration of managing principals and staff who have experience in performing work of a similar nature to that solicited in this request for qualifications. The following is a list of relevant projects completed within the last five (5) years.

Type of Document: CEQA Section 15183 Exemption

Contracting Agency/Client: City of Palmdale/Monte Vista Homes

Project Description: Preparation of a CEQA Section 15183 Exemption for the proposed construction of a 37-Unit single-family detached residential development project located at 45th Street East and East Avenue S-8, in the city of Palmdale, CA.

Type of Document: CEQA Class 32 Categorical Exemption - Infill Development

Contracting Agency/Client: City of Laguna Hills/Toll Brothers

Project Description: Preparation of a Class 32 In-Fill Development Exemption for the construction of a 43-unit townhome development on a 2.43-acre site located at 23161 Mill Creek, in the city of Laguna Hills, CA.

Type of Document: Artesia Place Residential Development Revised and Recirculate Draft and Final EIR Peer Review

Contracting Agency/Client: City of Artesia

Project Description: Conducted a peer review of the Artesia Place Residential Developed Revised and Recirculated Draft EIR for a 120-unit residential townhome development.

Type of Document: CEQA Class 32 Categorical Exemption - Infill Development

Contracting Agency/Client: City of Anaheim/Anaheim Porsche

Project Description: Construction of a new 223,664 square foot, 5-story automobile dealership to include new and pre-owned auto sales and repair. Proposed site improvements include a paved parking lot with 52 parking spaces, handicapped accessible parking and paths of travel, loading spaces, one driveway along Lincoln Avenue, and landscape planters around the perimeter of the site.

Type of Document: Initial Study/Mitigated Negative Declaration

Contracting Agency/Client: City of Temecula/Haven Winery

Project Description: Preparation of an IS/MND for the development of a winery with six (6) new buildings including tasting rooms, delicatessen, storage, restrooms, wine laboratory, barrel room, office, and wine storage with a total of 10,848 gross square feet.



Type of Document: Initial Study/Mitigated Negative Declaration

Contracting Agency/Client: City of Garden Grove/Brandywine Homes Santa Barbara Townhomes

Project Description: The preparation of an IS/MND environmental document analyzing the proposed development of a new 26-unit residential townhome project at 5802 Santa Catalina Ave, Garden Grove, California.

Type of Document: Initial Study/Mitigated Negative Declaration

Contracting Agency/Client: City of Banning/Brown Strauss Steel

Project Description: Preparation of an IS/MND for the Brown Strauss Industrial Development Project located at 1219 and 1431 W. Lincoln Street, in the city of Banning, CA (Riverside County). The development consisted of a steel manufacturing and distribution facility, which would consist of a 45,000 SF warehouse, a 3,000 SF office, two (2) 500 SF enclosed saw sheds attached to the warehouse and an outdoor storage yard.

Type of Document: Initial Study/Mitigated Negative Declaration Addendum

Contracting Agency/Client: City of Carson/Brandywine Homes

Project Description: Preparation of an Addendum to the approved 2019 Carson Landing Project IS/MND. Required to mitigate the potential health risk by installing vapor barriers & vents in the foundation of certain buildings, recording a covenant on the property prohibiting digging below 10" feet for future homeowners, providing external testing ports and committing to annual monitoring.

References

The team at Sagecrest includes a collaboration of managing principals and planners who have extensive experience of performing work of a similar nature to that solicited in this request for services. Four (4) On-Call Environmental Services references are provided. Additional references are available on request.

Term	City/Agency	Contact Person	Description of Services
2020 – Current	City of Lake Forest	Amy Stonich, AICP Assistant Director of Community Development City of Lake Forest 949.461.3479 astonich@lakeforest.gov	On-Call Environmental Planning Services; Pauling Industrial Development Class 32 In-Fill Exemption
2023 – Current	City of Santa Ana	Nancy Tran, AICP Senior Planner City of Santa Ana 714.667.2740 Ntran5@santa-ana.org	On-Call Environmental Services



Term	City/Agency	Contact Person	Description of Services
2024 – Current	City of San Juan Capistrano	Laura Stokes, Principal Planner City of San Juan Capistrano 949.443.6313 lstokes@sanjuancapstrano.org	On-Call Environmental Services; San Juan Plaza Class 32 and associated studies Peer Review
2024 – Current	City of Santa Fe Springs	Cuong Nguyen Director of Community Development 562.868.0511 ext.7359 cuongnguyen@santafesprings.gov	On-Call Environmental Services

PRICE PROPOSAL

Billing for On-Call Environmental Services will be based on the time and materials needed to perform such services. Our team will perform environmental tasks based on the following breakdown of classification of hourly rates for key personnel as identified below:

Sagecrest Planning + Environmental Rates

Position	Hourly Rate
President	\$250
Vice President/Planning Director	\$230
Principal/Planning Manager	\$220
Senior Project Manager/Principal Planner	\$200
Senior Planner	\$170
Project Manager/Associate Planner	\$150
Assistant Planner	\$130
Planning Aide	\$100
Operations Manager/Quality Control	\$90

Reimbursable Expenses

Expenses incurred will be billed at actual costs plus hourly rate, if applicable. Reimbursable expenses include, but are not limited to, reprographics, postage, certified mailings, office supplies such as flash drives, and application filing fees. Vehicle mileage will be billed at current IRS allowable rate and parking expenses incurred by Sagecrest employees are charged at cost. Approval of necessary expenditures will be requested in advance from the City's designated Contract Officer.



RK Engineering Group Rates

Position	Hourly Rate
Founding Principal	\$200
President	\$190
Principal	\$190
Associate Principal	\$180
Associate Engineer/Planner/Designer	\$170
Senior Engineer/Planner/Designer	\$150
Engineer/Planner/Designer V	\$140
Engineer/Planner/Designer IV	\$130
Engineer/Planner/Designer III	\$120
Engineer/Planner/Designer II	\$110
Engineer/Planner/Designer I	\$100
Assistant Engineer/Planner/Designer	\$90
Engineering Technician	\$70
Engineering Aide	\$50
Office Manager	\$80
Executive Assistant	\$80
Administrative Assistant	\$60
Administrative Aide	\$50

South Environmental Rates

Position	Hourly Rate
Principal Biologist	\$220
Senior Biologist	\$189
Biologist 2	\$168
Biologist 1	\$152
Biological Field Technician	\$126
Principal Architectural Historian/Archaeologist/Paleontologist	\$210
Senior Architectural Historian/Archaeologist/Paleontologist	\$178
Architectural Historian/Archaeologist/Paleontologist 2	\$157
Architectural Historian/Archaeologist/Paleontologist 1	\$142
Archaeological/Paleontological Field Technician	\$120
GIS Specialist	\$168



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ATTACHMENT A – RESUMES



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Amy Vazquez

President

CERTIFICATIONS + SKILLS

- American Planning Associate (APA) Member
- Section Director of Orange Section APA
- 2018 Emerging Planning and Design Firm
- 2019 Award of Excellence for Grassroots Initiative
- Adobe Acrobat
- Microsoft Office
- Communication
- Public Speaking

EDUCATION

B.A. Environmental Analysis and Design | Minor, Urban and Regional Planning
University of California, Irvine

EXPERIENCE

Sagecrest Planning + Environmental

President | 2017 – Present

- Manages a team of approximately 30 professionals including professional planners, code enforcement officers, building and safety personnel, contractors and other staff who provide services to client cities throughout Southern California.
- Preparation and oversight of multiple professional planning contracts throughout Southern California.
- Business development, diversification, client relations and staff recruitment, retention and discipline.
- Maintains successful relationships with current clients and employees/contractors.

City of San Clemente

Principal Planner | 2017 – 2018

- Primarily conducted high level current and advance planning projects through project management implementing the goals, objectives, policies and priorities of the City.
- Contract planner responsible for the Marblehead Coastal Specific plan.
- Managed the entitlements for the Outlets at San Clemente and the construction activities of the Sea Summit residential development.

City of Anaheim

Contract Planner | 2014 – 2017

- Responsible for project management of expedited entitlements and complex development applications.
- Reviewed and processed general plan amendments, re-classifications, subdivisions, annexations, conditional use permits and variances.
- Performed field inspections to gather data relevant to the development review process and/or to verify that development projects comply with approved plans.
- Scheduled and conducted meetings with other city departments and elected officials.
- Presented reports and other findings to staff, Planning Commission, and City Council.

Lilley Planning Group

Principal | January 2015 – April 2017

- Managed a team of over a dozen planners assigned throughout Southern California.
- Principal in charge of marketing and networking, client relations and staff retention.

EXPERIENCE CONTINUED

City of Anaheim

Associate Planner | 2001 – 2006

- Reviewed and processed complex general plan amendments, zoning code amendments, reclassifications, subdivisions, conditional use permits and variances.
- Processed entitlement requests and development agreements for mixed-use projects within the Platinum Triangle that included various planning studies and development applications.
- Prepared and reviewed proposal requests for consultant contracts for environmental studies and managed the entire CEQA review process.
- Performed field inspections to gather data relevant to the development review process and/or to verify that development projects comply with approved plans.
- Scheduled and conducted meetings with other city departments, applicants and consultants.
- Prepared and presented staff reports that included project analysis, project findings, and project recommendations for the City Council and Planning Commission
- Practiced excellent customer service at the public zoning counter.
- Supervised and mentored several Planning Aides, Assistant Planners and Planning Interns.

City of Huntington Beach

Planning Technician | 1998 – 2001

- Provided customer service to residents, business owners and developers at the public counter with new development projects residential, commercial and industrial alterations.
- Analyzed, evaluated, and performed technical review of site and architectural plans to verify conformance with appropriate zoning and building regulations.
- Conducted records requests for residents, business owner and developers.





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Lindsay Ortega, AICP

Vice President

CERTIFICATIONS + SKILLS

- American Institute of Certified Planners (AICP)
- Adobe Acrobat
- Adobe Photoshop
- ArcGIS Pro
- Bluebeam
- Microsoft Office
- Public Speaking
- Spanish – fluent

EDUCATION

Master of Urban and Regional Planning
University of California, Irvine

B.A. Political Science | Minor Public Affairs
University of California, Los Angeles

EXPERIENCE

Sagecrest Planning + Environmental

Vice President | 2017 – Present

- Manages team of land use and environmental planners.
- Coordinates CEQA review for the land use entitlement process between Lead Agencies, developers, and technical experts.
- Prepares CEQA documents to analyze and disclose the potential environmental impacts of development projects in compliance with the CEQA Statute and Guidelines.
- Manages the preparation of technical studies by a team of sub-consultants.
- Performs peer reviews of CEQA documents and associated technical studies.
- Provides technical assistance to contract staff placed in jurisdictions.
- Responsible for marketing and outreach to existing and prospective clients.
- Responds to RFPs and prepares written proposals.

Lilley Planning Group

Consultant Planner | 2016 – 2017

Planning Services: Cities of Anaheim & San Juan Capistrano

- Responsible for managing and processing a variety of project entitlement applications for compliance with local, state, and federal regulations. Such projects include comprehensive sign programs, Conditional Use Permits, infill residential projects, industrial and commercial developments, Architectural Control reviews, Grading Plan Modifications, Historical Structure Modifications/Reviews, and environmental reviews as needed.
- Presented projects to Planning Commission, as well as other necessary reviewing bodies; prepare staff reports and Planning Commission meeting packets, including preparation of resolutions, conditions of approval, and public hearing notices.
- Assisted at Planning Counter to review plan checks, sign permits, regulatory and special event permits, and any other over-the-counter requests, as needed.

City of Brea

Planning Specialist | 2016

- Assisted customer at public counter and over the telephone; answered questions; explained procedures, assisted the public in completing forms and applications; received forms and applications; handled complaints and resolved problems.
- Reviewed plan checks, sign permits, temporary sign permits, and any other over-the-counter requests.
- Prepared staff reports and Planning Commission meeting packets, including preparation of resolutions, conditions of approval, and public hearing notices.

EXPERIENCE CONTINUED

Core Development Services

Zoning Manager | 2014 – 2016

- Responsible for securing all necessary governmental zoning approvals and entitlements for existing and new wireless facility modifications and renewals throughout Southern California, with an average project load of 100 sites from various carriers and tower companies.
- Extensive review of jurisdiction-specific zoning code and regulatory land use policies to make necessary findings for approval, troubleshoot design to ensure speed to market approval.
- Gathered necessary third-party services for permit submittals, represent the client at public hearings, follow the project to completion ensuring all jurisdictional Conditions of Approval are met.
- Conduct all necessary due diligence research and project milestone forecasts to meet client expectations.

Community Action Partnership

Planner | 2011 – 2014

- Researched and prepared grant proposals for the development of programs in high-need areas of Orange County.
- Responsible for the management of all grant funding programs to ensure compliance and parameters of funding received through the collection and tracking of programmatic performance indicators and outcomes.
- Oversaw and ensured private and public contract compliance, including CSBG, CDBG, USDA, County of Orange, OC United Way Funding, and other private, corporate, and foundation contracts.
- Prepared and completed contract reports, private and public requests for proposals, and strategic project implementation plans.

City of Fountain Valley

Graduate Intern | 2011

- Worked with City Manager Department to spearhead economic development in City by implementing shop local programs, green initiatives, city branding.
- Assisted Planning Department in assessing current zoning and permitting processes, to encourage economic development and business friendly environment.
- Tracked legislation affecting Orange County municipalities, as well as draft letters of support/opposition to governmental officials regarding current legislation.

Davies Public Affairs

Project Assistant | 2006-2009

- Assisted with day-to-day implementation of project tasks for large scale land-use and entitlement campaigns.
- Coordinated production of direct mail outreach efforts to inform communities of local projects, identify supporters.
- Researched relevant markets to assess temperature of opposition, potential obstacles/advantages for a project.
- Supported project team in effectively implementing client strategies, executed tasks related to that implementation.



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Kelly Ribuffo

Senior Project Manager

CERTIFICATIONS + SKILLS

- Associate of Environmental Professional (AEP) Member
- Adobe Acrobat
- Microsoft Office
- Granicus/Legistar
- Superion TrackIt
- Architectural Plan Review
- Archeological and Environmental Technical Review

EDUCATION

Master of Historic Preservation
University of Oregon

B.A. Anthropology
B.A. Asian Studies
University of Florida

EXPERIENCE

Sagecrest Planning + Environmental Senior Project Manager | 2022 – Present

- Provides staff support services to the cities of Avalon and Newport Beach, including review of entitlement applications and long-range planning services.
- Prepares California Environmental Quality Act (CEQA) documents for private and public sector clients, including Initial Studies, Mitigation Negative Declarations (MNDs), and Appendix N and Class 32 streamlining checklists.
- Manages preparation of technical studies to support CEQA review, including Air Quality, Biological, Cultural, Geotechnical, Greenhouse Gas, Historic, Hydrology, Noise, Phase I/II, Traffic, and WQMP.
- Coordinates with clients, City staff, subconsultant teams to facilitate processing of complex development projects.
- Provides peer review of CEQA documents and associated technical studies.
- Manages complex entitlement applications for private sector clients.

City of Orange Associate Planner, Historic Preservation | 2014 – 2022

- Reviewed development applications throughout the city, including multifamily residential, commercial infill, conditional use permits, variances, zone changes, site plan reviews, and administrative design reviews.
- Provided specialized design review of historically designated properties for compliance with the City's historic preservation design standards, with properties ranging from the late 19th to mid-20th century period.
- Coordinated development project review with other City departments through the internal staff review committee.
- Prepared staff reports, including recommendations and resolutions/ordinances, for presentation before the Design Review Committee, Planning Commission, and City Council.
- Reviewed historic, archaeological, and environmental technical reports and performed cultural resources survey work as needed.
- Designated staff planner responsible for processing all development applications related to Chapman University, located within the Old Towne National Historic District.
- Administered the City's Mills Act Tax Exemption program for qualified historic properties.

EXPERIENCE CONTINUED

City of Lake Worth Beach (formerly Lake Worth)

Preservation Planning Coordinator | 2012 – 2014

- Designated zoning reviewer and project manager for all planning and zoning actions involving local historic properties throughout the City, including site plans, variances, conditional use permits, and certificates of appropriateness for residential and commercial properties.
- Prepared and presented staff reports to the Historic Resources Preservation Board and City Commission.
- Provided customer service at the public counter answering phone calls, emails and in-person questions concerning zoning, entitlements, and historic preservation.
- Certified Local Government coordinator and administrator of the City's Historic Ad Valorem Tax Exemption program.
- Participated in preparation of amendments to the City's Land Development Regulations (LDRs) and Comprehensive Plan.

National Park Service, Alaska Regional Office

Historian | 2011 – 2011

- Hired by the Alaska Regional Office as part of the National Register Initiative program.
- Conducted on-site field visits and recordation, as well as in-office report writing in a professional office setting.
- Projects completed:
 - Determination of Eligibility (DOE) for the Mission 66 employee residences at Glacier Bay National Park and Preserve.
 - Complete draft for a National Register nomination to expand the headquarters historic district at Denali National Park and Preserve.

Southarc, Inc.

Archaeological Technician | 2007 – 2009

- Performed Phase I shovel test surveys, Phase II and III archaeological excavations and conducted research utilizing library and internet resources, artifact cataloging and analysis.
- Completed compliance paperwork for the State Historic Preservation Office (SHPO).
- Conducted historic architectural surveys and made determinations of eligibility for the National Register.





SAGECREST
PLANNING + ENVIRONMENTAL

Jackie Tran

Project Manager

CERTIFICATIONS + SKILLS

- Adobe Acrobat
- Adobe Photoshop
- Adobe InDesign
- ArcGIS Pro
- Bluebeam
- CalEEMod
- Microsoft Office
- Vietnamese – conversational

EDUCATION

B.A. Urban Studies |
Minor, Conflict Resolution
University of California,
Irvine

EXPERIENCE

Sagecrest Planning + Environmental

Project Manager | 2024 – Present

- Project manage and prepare CEQA documents for private and public sector clients, including Mitigated Negative Declarations (MNDs), Categorical Exemptions, and Statutory Exemptions.
- Conduct CEQA Peer Review of prepared environmental documents for residential, industrial, and commercial projects.
- Prepare and recommend mitigation measures as part of Mitigation Monitoring and Reporting Programs (MMRPs) for biological, air quality, greenhouse gas, noise, energy, cultural, and other environmental issues.
- Conduct environmental due diligence on properties, including reviewing hazardous records from the Department of Toxic Control Substances (DTSC) and agency long-range documents to anticipate potential environmental impacts and CEQA path.
- Work with environmental or land use attorneys to draft legal defense memorandums for CEQA challenges.
- Coordinates the preparation of specializes in environmental technical documents, including Categorical Exemptions, Phase I ESAs, Air Quality, Greenhouse Gas, Noise, and Energy, under CEQA/NEPA for a variety of planning projects involving residential, redevelopment, infrastructure, and commercial uses.

Kimley-Horn – Planning Team

Planning Analyst | 2021 – 2024

- Project managed and drafted Phase I ESAs for industrial, commercial, and residential projects.
- Drafted CEQA technical studies for Air Quality, Greenhouse Gas, Noise, and Energy and calculated emissions via CalEEMod.
- Conduct site reconnaissance and interview property owners for Phase I ESAs and Noise technical studies.
- Drafted long-range planning documents (Specific Plans, General Plan Updates: Housing Element, Safety Element/Climate Vulnerability Assessment) in collaboration with team members.
- Drafted baseline conditions reports for universities and airports.
- Collected and analyzed data from stakeholder meetings, public outreach, and agencies (ex: Census data).
- Project managed due diligence & entitlements (Planning Approval to Building Permit issuance) for 40+ stores for big-box retail clients (Target, Walmart, Amazon, Costco) in multiple states.
- Presented at stakeholder meetings, community workshops, and City Council/Planning Commission meetings.
- Collaborate closely between clients, agencies, and different disciplines for project facilitation.
- Researched local ordinances, municipal codes, and state laws for projects.

EXPERIENCE CONTINUED

TAIT & Associates – Land Development Team

Development Project Coordinator/Consultant for Orange County Public Works | 2020 – 2021

- Submitted in-person and online programmatic entitlements with AHJ staff for 7-Eleven.
- Plan check, approve, and issue permits/clearances for commercial and residential submittals and coordinating with County staff on permit intake/distribution.

OC Habitats

Environmental Research Intern | 2020 – 2021

- Monitor and survey habitats of Western Snowy Plover in Orange County.
- Conducted qualitative and quantitative data research and analysis through surveys, monitoring, and interviews of government agencies and environmental organizations.
- Writing and research for grants, sponsorships, and funding applications.





SAGECREST
PLANNING + ENVIRONMENTAL

Kaden Likins

Assistant Planner

CERTIFICATIONS + SKILLS

- Adobe Acrobat
- ArcGIS
- Canva
- Microsoft Office
- Public Speaking

EDUCATION

B.A. Urban Studies and Planning | Minor, Climate Change Studies

University of California,
San Diego

EXPERIENCE

Sagecrest Planning + Environmental

Assistant Planner | 2024 – Present

Planning Services: Cities of Avalon, Huntington Beach, Lake Forest, and Villa Park

- Reviews formal applications, development proposals, CEQA documents, and construction plans to ensure compliance with city policies, ordinances, and codes.
- Processes entitlements including variances, CUPs, design review and wireless telecommunications facilities.
- Prepares and presents reports to the Planning Commission and City Council.
- Manages plan checks for ADUs, single and multi-family residential developments, and tenant improvements.
- Conducts research on existing zoning codes, prepares updates to comply with State law and City Policies.
- Prepares GIS maps to analyze options for zoning code updates.

Development Services:

- Coordinates with architects and civil engineers for the development of plans to be submitted for entitlements.
- Reviews plans to ensure compliance with zoning codes.
- Conducts research on ordinances, processes, timelines, and fees to develop due diligence reports.

Environmental Services:

- Reviews projects for compliance with CEQA and makes determination on appropriate CEQA path.
- Prepares project descriptions and additional sections for CEQA documents.
- Writes initial studies based on information contained in project description and technical studies.
- Prepares Notice of Intent (NOI), Notice of Preparation (NOP), Notice of Determinations (NOD), and Notice of Exemptions (NOE).
- Prepares Tribal Consultation Letters (AB 52 and SB 18).

Bioregional Center – University of California, San Diego

Student Research Intern | 2023

- Conducted research on sustainable agriculture in San Diego to collect data on local farms, converting the data into ArcGIS and compiling findings into excel spreadsheets.
- Managed the weekly presentations of all data, findings, and maps to the research team.

City of San Diego

Planning Intern | 2023

- Coordinated policy decisions, planning improvements, and sustainability across multiple departments within the jurisdiction.
- Presented improvement strategies to City Departments.



SAGECREST
PLANNING + ENVIRONMENTAL

Emily Tragos

Operations Manager

CERTIFICATIONS + SKILLS

- Quality Control
- Creative Services
- Copywriting/Editing
- Promotional Marketing
- Midas Award Honoring Excellence in Financial Services Communications
- AME International Award Honoring Advertising and Marketing Effectiveness
- Adobe Acrobat
- Adobe Illustrator
- Microsoft Office

EDUCATION

B.A. Communications |
Minor, Public Relations
California State University,
Fullerton

EXPERIENCE

Sagecrest Planning + Environmental Operations Manager | July 2022 – Present

- Manages and prepares all print mailings, including but not limited to public notices, notices of preparation, notices of determination, etc.
- Responsible for ensuring that technical documents, reports, and deliverables, are accurate, clear, and concise.
- Provides administrative support to the Project Team to include editing and formatting correspondence and finalizing print deliverables.
- Responsible for quality review functions including editorial review for structure, grammar, general clarity, and common rules of technical writing.

Tajima Creative Services

Senior Account Manager | January 2004 – October 2008

- Effectively managed workflow from creative conception to execution while delivering projects within budget and timelines.
- Responsible for securing and managing a team of designers, copywriters, contractors, print and fulfillment resources on a project-by-project basis.
- Responsible for quality review, editing, proofreading, and on-site press checks for print deliverables.

Washington Mutual Bank (WaMu)

Senior Marketing Manager, AVP | February 2000 – October 2004

- Managed all creative marketing initiatives for the retail home loans division, including the creation, brand messaging, quality control and production of all printed and electronic deliverables.
- Managed all aspects of direct mail marketing campaigns for both business to business and business to consumer clients.
- Managed multiple teams to deliver on brand marketing deliverables that aligned with corporate goals.

Ameriquest Mortgage Company

Senior Sales Event Manager | September 1996 – January 2000

- Created, managed, and executed multi-million-dollar events and incentive plans to increase revenue and secure employee retention.
- Developed the tracking and results analysis for quarterly and annual sales incentive programs.
- Responsible for developing the creative, promotions, site location, talent selection, and on-site management for national sales meetings and international incentive trips.

Bryan Estrada, AICP, PTP

Principal



Areas of Expertise

Transportation Planning
Traffic Engineering
Traffic Impact Studies
Traffic Calming
Parking
Vehicle Miles Traveled
Active Transportation & Bicycle Planning
Air Quality Emissions
Greenhouse Gas and Global Climate Change
Acoustical Engineering
Noise & Vibration Impact Studies
Energy Conservation
CEQA Compliance

Education

University of California, Irvine, B.A., Urban Studies

Professional History

RK Engineering Group, Inc.
Principal
2007 - Present

Certifications

American Institute of Certified Planners (AICP)
Professional Transportation Planner (PTP)

Affiliations

American Planning Association (APA)
Association of Environmental Professionals (AEP)
Orange County Traffic Engineering Council (OCTEC)

Volunteer

Costa Mesa Active Transportation Committee - Member
(2019 – 2023)

Representative Experience

Mr. Bryan Estrada is a native of Southern California and also stayed in the area by attending the University of California, Irvine, School of Planning, Policy and Design where he received a Bachelor of Arts degree in Urban Studies.

As a Principal at RK Engineering Group, Inc. (RK), Mr. Estrada oversees the Environmental Department and provides Air Quality, Greenhouse Gas, Noise, and Energy Conservation consulting services. Mr. Estrada also oversees Transportation Planning projects and has led RK's effort to be at the forefront of offering Vehicle Miles Traveled modeling services.

Mr. Estrada's experience includes traffic engineering and transportation planning, air quality and greenhouse gas analysis, and environmental acoustics and noise analyses. He has also contributed to the design of traffic signals, signing and striping plans and traffic control plans. Mr. Estrada is frequently engaged with clients and developers, local government agencies, and community groups to help craft innovative solutions to mitigate traffic, noise and air quality impacts.

Mr. Estrada works on projects that range from regional and General Plan level analyses to focused site-specific technical studies. His recent work includes Mixed Use Development projects in Downtown Huntington Beach, the City of Aliso Viejo General Plan Update and Aliso Viejo Town Center Vision Plan, Eleanor Roosevelt High School eStem Academy Traffic Impact Study and On-Site Circulation Plan (Eastvale, CA), Great Wolf Lodge Resort (Garden Grove, CA), Starbucks Coffee Shops (multiple locations through Southern California), Paradise Knolls Specific Plan (Jurupa Valley, CA), Vista Del Agua Specific Plan (Coachella, CA), and Monterey Park Hotel Mixed Use Development Project (Monterey Park, CA).

Mr. Estrada is an active member of the American Planning Association (APA) and the Association of Environmental Professionals (AEP) and stays up to date on the latest trends and topics concerning CEQA policy.

Mr. Estrada has obtained the American Institute of Certified Planners (AICP) certification granted by the American Planning Association and the Professional Transportation Planner (PTP) certification granted by the Transportation Professional Certification Board.

Mr. Estrada formerly served on the Costa Mesa Active Transportation Committee.

EDUCATION

M.A., Anthropology,
California State University,
Los Angeles, 2013

B.A., Anthropology,
California State University,
Northridge, 2003

PROFESSIONAL

AFFILIATIONS

California Preservation
Foundation

National Trust for Historic
Preservation

PROFESSIONAL

CERTIFICATIONS

Registered Professional
Archaeologist (2013)

Samantha Murray, MA, RPA

CULTURAL RESOURCES DIRECTOR

Samantha Murray is the cultural resources director and archaeological principal investigator at South Environmental with over 18 years' experience in all elements of cultural resources management, including project management, archaeology and architectural history studies, and significance evaluations in consideration of the National Register of Historic Places (NRHP), California Register of Historical Resources (CRHR), and local-level designation criteria. Ms. Murray has conducted thousands of Phase I archaeological studies, historical resource evaluations, and has developed detailed historic context statements for a multitude of property types and architectural styles. She has also provided expertise on numerous projects requiring conformance with the Secretary of the Interior's Standards for the Treatment of Historic Properties.

Ms. Murray meets the Secretary of the Interior's Professional Qualification Standards for both Archaeology and History. She is experienced managing multidisciplinary projects in the lines of private development, transportation, transmission and generation, federal land management, land development, and state and local government. She is an expert in preparation of cultural resources compliance documentation for projects that fall under the California Environmental Quality Act (CEQA), National Environmental Policy Act (NEPA), and Sections 106 and 110 of the National Historic Preservation Act (NHPA). Ms. Murray has also served as an expert witness in legal proceedings concerning historical resources under CEQA and local ordinance protection.

EXPERTISE

- CEQA, NEPA, and Section 106 of the NHPA compliance documentation in consideration of impacts to historical, archaeological, and tribal cultural resources, and historic properties.
- Resource significance evaluations in consideration of NRHP, CRHR, and local designation criteria.
- Project design review for conformance with the Secretary of the Interior's Standards.
- Assistance with complex mitigation including HABS/HAER/HALS, salvage, and interpretive displays.
- Peer review.