

## **RESPONDENTS MUST COMPLETE THE FOLLOWING**

RESPONDENT CONTRACTORS ARE CAUTIONED THAT THE POLICY OF THE PINELLAS COUNTY BOARD OF COUNTY COMMISSIONERS IS TO ACCEPT THE LOWEST RESPONSIVE AND RESPONSIBLE SUBMITTAL RECEIVED MEETING SPECIFICATIONS. NO CHANGES REQUESTED BY A CONTRACTOR DUE TO AN ERROR IN PRICING WILL BE CONSIDERED AFTER THE SOLICITATION OPENING DATE AS ADVERTISED. BY SIGNING THIS SUBMITTAL FORM, CONTRACTORS ARE ATTESTING TO THEIR AWARENESS OF THIS POLICY AND ARE AGREEING TO ALL OTHER SOLICITATION TERMS AND CONDITIONS, INCLUDING ANY INSURANCE REQUIREMENTS CONTAINED HEREIN.

CONTRACTOR NAME: HR Green, Inc. (As shown on W-9)

DBA: \_\_\_\_\_ (If applicable)

MAILING ADDRESS: 8710 Earhart Lane SW (As shown on W-9)

CITY / STATE / ZIP: Cedar Rapids, IA 52404-8947 (As shown on W-9)

VENDOR EMAIL: payables@hrgreen.com (Primary Company Email Address)

REMIT TO NAME: HR Green, Inc., PO Box 8213, Des Moines, IA 50301-8213 (As Shown on Vendor Invoice)

FEIN#: 42-2927178 (As shown on W-9)

PAYMENT TERMS: 100% 45 DAYS, NET 45 (PER F.S. 218.73)

DEPOSIT, IF REQUIRED, IS ATTACHED IN THE AMOUNT OF \$ N/A

Proper Corporate Identity is needed when you submit your quote, especially how your firm is registered with the Florida Division of Corporations. Please visit [dos.myflorida.com/sunbiz/](http://dos.myflorida.com/sunbiz/) for this information. It is essential to return a copy of your W-9 with your quote. Thank you.

### VENDOR CONTACT INFORMATION

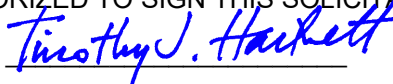
CONTACT NAME: HR Green, Inc.

PHONE NUMBER: 319.841.4000

FAX NUMBER: 713.965.0044

EMAIL ADDRESS: payables@hrgreen.com

THE CONTRACTOR HEREBY SUBMITS AN IRREVOCABLE OFFER IN RESPONSE TO THIS SOLICITATION, SUBJECT TO ALL STANDARD AND SPECIAL TERMS AND CONDITIONS REFERENCED THEREIN WITHOUT EXCEPTION, AND AGREES TO ABIDE BY ALL CONDITIONS OF THIS SOLICITATION, INCLUDING ALL INSURANCE REQUIREMENTS. BY SIGNING, BELOW, I CERTIFY THAT I AM AUTHORIZED TO SIGN THIS SOLICITATION FOR THE CONTRACTOR.

AUTHORIZED SIGNATURE: 

PRINT NAME: Timothy Hartnett

TITLE: Vice President

SEE PRICING PROPOSAL SECTION FOR PRICING SUMMARY

THIS FORM MUST BE RETURNED WITH YOUR RESPONSE



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
12/14/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Holmes Murphy & Associates - CR  201 First Street SE, Suite 700  Cedar Rapids, IA 52401	1-800-300-0325	CONTACT NAME: Ashley Hampsher PHONE (A/C No. Ext): 319-896-7664 E-MAIL ADDRESS: ahampsher@holmesmurphy.com	FAX (A/C No):
INSURED HR Green, Inc.  8710 Earhart Lane SW  Cedar Rapids, IA 52404		INSURER(S) AFFORDING COVERAGE INSURER A: Zurich American Insurance Company INSURER B: Travelers Property Casualty Company of INSURER C: XL SPECIALTY INS CO INSURER D: INSURER E: INSURER F:	NAIC # 16535 25674 37885

**COVERAGES**

CERTIFICATE NUMBER: 67305302

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER:			GLO373096713	01/01/23	01/01/24	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BAP373096813	01/01/23	01/01/24	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP8S97473323NF	01/01/23	01/01/24	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	WC373096613	01/01/23	01/01/24	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Professional Liability (Claims Made Coverage)			DPR5006485	01/01/23	01/01/24	Per Claim 5,000,000 Aggregate 10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

To Whom it May Concern	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE  <i>M. A. Hampsher</i>

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**CONTRACTOR REFERENCES** (Page 2 of 2)

THE FOLLOWING INFORMATION IS REQUIRED IN ORDER THAT YOUR PROPOSAL MAY BE REVIEWED AND PROPERLY EVALUATED.

COMPANY NAME: HR Green, Inc.

LENGTH OF TIME COMPANY HAS BEEN IN BUSINESS: 110 Years

BUSINESS ADDRESS: 8710 Earhart Lane SW., Cedar Rapids, IA 52404

HOW LONG IN PRESENT LOCATION: 23 Years

TELEPHONE NUMBER: 319.841.4000

FAX NUMBER: 713.965.0044

TOTAL NUMBER OF CURRENT EMPLOYEES: 588 FULL TIME 99 PART TIME

NUMBER OF EMPLOYEES YOU PLAN TO USE TO SERVICE THIS CONTRACT: an ample number of staff to meet your needs. Depending on the County workload, we have

All references will be contacted by a County Designee via email, fax or phone call to obtain answers to questions, as applicable before an evaluation decision is made.

Respondents must have experience in work of the same or similar nature, and must provide references that will satisfy the County. Proposer must furnish a reference list of at least four (4) customers for whom they have performed similar services.

EITHER LOCAL COMMERCIAL OR GOVERNMENTAL REFERENCE(S) (PINELLAS COUNTY GOVERNMENT REFERENCES WILL NOT BE ACCEPTED) THAT YOU HAVE PREVIOUSLY PERFORMED SIMILAR CONTRACT SERVICES FOR:

5.	6.
COMPANY: <b>City of Palm Desert, CA</b>	COMPANY: <b>City of Jurupa Valley, CA</b>
ADDRESS: 73-510 Fred Waring Dr. Palm Desert, CA 92260	ADDRESS: 8930 Limonite Avenue Jurupa Valley, CA 92509
TELEPHONE/FAX: 760.776.6420 / 760.346.0611	TELEPHONE/FAX: 951.332.6464
CONTACT: Jason Finley / Todd Hileman	CONTACT: Rod Butler
CONTACT EMAIL: jfinley@cityofpalmdesert.org thileman@cityofpalmdesert.org	CONTACT EMAIL: rbutler@jurupavalley.org
COMPANY EMAIL ADDRESS: See Above	COMPANY EMAIL ADDRESS: See Above
7.	8.
COMPANY: <b>City of Auburn, AL</b>	COMPANY: <b>City of Aurora, CO</b>
ADDRESS: 171 North Ross, Suite 300 Auburn, AL 36830	ADDRESS: 15151 E. Alameda Parkway Aurora, CO 80012
TELEPHONE/FAX: 334.501.3176	TELEPHONE/FAX: 303.739.7300
CONTACT: John Hoar	CONTACT: Haley B. Johansen
CONTACT EMAIL: jhoar@auburnalabama.org	CONTACT EMAIL: hjohansen@auroragov.org
COMPANY EMAIL ADDRESS: See Above	COMPANY EMAIL ADDRESS: See Above

## ELECTRONIC PAYMENT (EPAYABLES)

The Board of County Commissioners (County) is offering faster payments. The County would prefer to make payment using credit card through the ePayables system.

Would your company accept to participate in the ePayables credit card program?

Yes \_\_\_\_\_ No X **Note:** While we cannot process credit cards, we can accept Electronic Fund Transfers (EFT) or wire transfers.

For more information about ePayables credit card program please visit Purchasing Department website

<https://pinellas.gov/epayables-2/>

HR Green, Inc.

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Company Name

*Timothy J. Hartnett*

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Signature

Timothy Hartnett

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Printed Signature

815.759.8328

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Phone Number

thartnett@hrgreen.com

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Email

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# Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p><b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>HR Green Inc</b></p> <p><b>2</b> Business name/disregarded entity name, if different from above</p> <p><b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC</p> <p><input checked="" type="checkbox"/> <b>C Corporation</b></p> <p><input type="checkbox"/> S Corporation</p> <p><input type="checkbox"/> Partnership</p> <p><input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p><b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p>	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p><b>5</b> Address (number, street, and apt. or suite no.) See instructions. <b>8710 Earhart LN SW</b></p> <p><b>6</b> City, state, and ZIP code <b>Cedar Rapids, IA 52404</b></p>	<p>Requester's name and address (optional)</p>
	<p><b>7</b> List account number(s) here (optional)</p>	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>										
				-						
<b>or</b>										
<b>Employer identification number</b>										
4	2		-	0	9	2	7	1	7	8

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Casey Meader</i>	Date ▶ <i>01/11/2023</i>
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

**E-VERIFY AFFIDAVIT**

I hereby certify that HR Green, Inc [insert contractor company name] does not employ, contract with, or subcontract with an unauthorized alien, and is otherwise in full compliance with Section 448.095, Florida Statutes.

All employees hired on or after January 1, 2021 have had their work authorization status verified through the E-Verify system.

A true and correct copy of HR Green, Inc [insert contractor company name] proof of registration in the E-Verify system is attached to this Affidavit.

Signature: [Signature]  
Print Name: Becca Springfield  
Date: 3/29/2023

Federal Work Authorization User Identification No.: \_\_\_\_\_

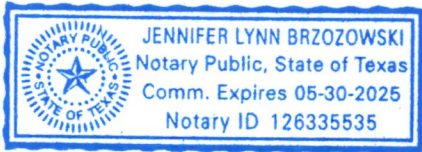
Name of Pinellas County Contract and Contract No.: \_\_\_\_\_

Texas  
STATE OF FLORIDA COUNTY OF Harris

The foregoing instrument was acknowledged before me by means of 1) physical presence or 2) online notarization, this 3/29/2023 (date) by Becca Springfield, Director of HR (name of officer or agent, title of officer or agent) of HR Green, Inc (name of contractor company acknowledging), a Iowa (state or place of incorporation) corporation, on behalf of the corporation.

He/she is personally known to me or has produced Driver's License (type of identification) as identification.

[Notary Seal]



Notary Public: [Signature]  
Name typed, printed, or stamped: Jennifer Brzozowski  
My Commission Expires: 05/30/2025

**THE E-VERIFY**  
**MEMORANDUM OF UNDERSTANDING**  
**FOR EMPLOYERS USING A WEB SERVICES E-VERIFY EMPLOYER AGENT**

**ARTICLE I**  
**PURPOSE AND AUTHORITY**

The parties to this agreement are the Department of Homeland Security (DHS), the HR Green, Inc (Employer), and the Web Services E-Verify Employer Agent. The purpose of this agreement is to set forth terms and conditions which the Employer and the Web Services E-Verify Employer Agent will follow while participating in E-Verify.

E-Verify is a program that electronically confirms an employee's eligibility to work in the United States after completion of Form I-9, Employment Eligibility Verification (Form I-9). This Memorandum of Understanding (MOU) explains certain features of the E-Verify program and describes specific responsibilities of the Employer, the E-Verify Employer Agent, the Social Security Administration (SSA), and DHS.

References in this MOU to the Employer include the Web Services E-Verify Employer Agent when acting on behalf of the Employer.

For purposes of this MOU, the E-Verify browser refers to the website that provides direct access to the E-Verify system: <https://e-verify.uscis.gov/emp>. You may access E-Verify directly free of charge via the E-Verify browser.

Authority for the E-Verify program is found in Title IV, Subtitle A, of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRIRA), Pub. L. 104-208, 110 Stat. 3009, as amended (8 U.S.C. Section 1324a note). The Federal Acquisition Regulation (FAR) Subpart 22.18, "Employment Eligibility Verification" and Executive Order 12989, as amended, provide authority for Federal contractors and subcontractors (Federal contractor) to use E-Verify to verify the employment eligibility of certain employees working on Federal contracts.

**ARTICLE II**  
**RESPONSIBILITIES**

**A. RESPONSIBILITIES OF THE EMPLOYER**

1. For purposes of this MOU, references to the Employer include the Web Services E-Verify Employer Agent when acting on behalf of the Employer.
2. By enrolling in E-Verify and signing the applicable MOU, the Employer asserts that it is a legitimate company which intends to use E-Verify for legitimate purposes only and in accordance with the laws, regulations and DHS policies and procedures relating to the use of E-Verify.
3. The Employer agrees to display the following notices supplied by DHS (though the Web Services E-Verify Employer Agent) in a prominent place that is clearly visible to prospective employees and all employees who are to be verified through the system:
  - A. Notice of E-Verify Participation
  - B. Notice of Right to Work
4. The Employer agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the Employer representatives to be contacted about E-Verify. The Employer also agrees to keep such information current by providing updated information to SSA and DHS whenever the representatives' contact information changes.
5. The Employer agrees to become familiar with and comply with the most recent version of the E-Verify User Manual. The Employer will obtain the E-Verify User Manual from the Web Services E-Verify Employer Agent, and will be notified by the Web Services E-Verify Employer Agent when a new version of the E-Verify User Manual becomes available.
6. The Employer agrees to comply with current Form I-9 procedures, with two exceptions:
  - A. If an employee presents a "List B" identity document, the Employer agrees to only accept "List B" documents that contain a photo. (List B documents identified in 8 C.F.R. 274a.2(b)(1)(B)) can be presented during the Form I-9 process to establish identity.) If an employee objects to the photo

requirement for religious reasons, the Employer should contact E-Verify at 888-464-4218.

- B. If an employee presents a DHS Form I-551 (Permanent Resident Card), Form I-766 (Employment Authorization Document), or U.S. Passport or Passport Card to complete Form I-9, the Employer agrees to make a photocopy of the document and to retain the photocopy with the employee's Form I-9. The Employer will use the photocopy to verify the photo and to assist DHS with its review of photo mismatches that employees contest. DHS may in the future designate other documents that activate the photo screening tool.

Note: Subject only to the exceptions noted previously in this paragraph, employees still retain the right to present any List A, or List B and List C, document(s) to complete the Form I-9.

7. The Employer agrees to record the case verification number on the employee's Form I-9 or to print the screen containing the case verification number and attach it to the employee's Form I-9.
8. The Employer agrees that, although it participates in E-Verify, the Employer has a responsibility to complete, retain, and make available for inspection Forms I-9 that relate to its employees, or from other requirements of applicable regulations or laws, including the obligation to comply with the antidiscrimination requirements of section 274B of the INA with respect to Form I-9 procedures.
- A. The following modified requirements are the only exceptions to an Employer's obligation to not employ unauthorized workers and comply with the anti-discrimination provision of the INA: (1) List B identity documents must have photos, as described in paragraph 6 above; (2) When an Employer confirms the identity and employment eligibility of newly hired employee using E-Verify procedures, the Employer establishes a rebuttable presumption that it has not violated section 274A(a)(1)(A) of the Immigration and Nationality Act (INA) with respect to the hiring of that employee; (3) If the Employer receives a final nonconfirmation for an employee, but continues to employ that person, the Employer must notify DHS and the Employer is subject to a civil money penalty between \$550 and \$1,100 for each failure to notify DHS of continued employment following a final nonconfirmation; (4) If the Employer continues to employ an employee after receiving a final nonconfirmation, then the Employer is subject to a rebuttable presumption that it has knowingly employed an unauthorized alien in violation of section 274A(a)(1)(A); and (5) no E-Verify participant is civilly or criminally liable under any law for any action taken in good faith based on information provided through the E-Verify.
- B. DHS reserves the right to conduct Form I-9 compliance inspections, as well as any other enforcement or compliance activity authorized by law, including site visits, to ensure proper use of E-Verify.
9. The Employer is strictly prohibited from creating an E-Verify case before the employee has been hired, meaning that a firm offer of employment was extended and accepted and Form I-9 was completed. The Employer agrees to create an E-Verify case for new employees within three Employer business days after each employee has been hired (after both Sections 1 and 2 of Form I-9 have been completed), and to complete as many steps of the E-Verify process as are necessary according to the E-Verify User Manual. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the Employer's attempting, in good faith, to make inquiries during the period of unavailability.
10. The Employer agrees not to use E-Verify for pre-employment screening of job applicants, in support of any unlawful employment practice, or for any other use that this MOU or the E-Verify User Manual does not authorize.
11. The Employer must use E-Verify (through its Web Services E-Verify Employer Agent) for all new employees. The Employer will not verify selectively and will not verify employees hired before the effective date of this MOU. Employers who are Federal contractors may qualify for exceptions to this requirement as described in Article II.B of this MOU.
12. The Employer agrees to follow appropriate procedures (see Article III below) regarding tentative nonconfirmations. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending. Further, when employees contest a tentative nonconfirmation based upon a photo mismatch, the Employer must take additional steps (see Article III.B below) to contact DHS with information necessary to resolve the challenge.
13. The Employer agrees not to take any adverse action against an employee based upon the employee's perceived employment eligibility status while SSA or DHS is processing the verification request unless the



Employer obtains knowledge (as defined in 8 C.F.R. Section 274a.1(l)) that the employee is not work authorized. The Employer understands that an initial inability of the SSA or DHS automated verification system to verify work authorization, a tentative nonconfirmation, a case in continuance (indicating the need for additional time for the government to resolve a case), or the finding of a photo mismatch, does not establish, and should not be interpreted as, evidence that the employee is not work authorized. In any of such cases, the employee must be provided a full and fair opportunity to contest the finding, and if he or she does so, the employee may not be terminated or suffer any adverse employment consequences based upon the employee's perceived employment eligibility status (including denying, reducing, or extending work hours, delaying or preventing training, requiring an employee to work in poorer conditions, withholding pay, refusing to assign the employee to a Federal contract or other assignment, or otherwise assuming that he or she is unauthorized to work) until and unless secondary verification by SSA or DHS has been completed and a final nonconfirmation has been issued. If the employee does not choose to contest a tentative nonconfirmation or a photo mismatch or if a secondary verification is completed and a final nonconfirmation is issued, then the Employer can find the employee is not work authorized and terminate the employee's employment. Employers or employees with questions about a final nonconfirmation may call E-Verify at 1-888-464-4218 (customer service) or 1-888-897-7781 (worker hotline).

14. The Employer agrees to comply with Title VII of the Civil Rights Act of 1964 and section 274B of the INA as applicable by not discriminating unlawfully against any individual in hiring, firing, employment eligibility verification, or recruitment or referral practices because of his or her national origin or citizenship status, or by committing discriminatory documentary practices. The Employer understands that such illegal practices can include selective verification or use of E-Verify except as provided in part D below, or discharging or refusing to hire employees because they appear or sound "foreign" or have received tentative nonconfirmations. The Employer further understands that any violation of the immigration-related unfair employment practices provisions in section 274B of the INA could subject the Employer to civil penalties, back pay awards, and other sanctions, and violations of Title VII could subject the Employer to back pay awards, compensatory and punitive damages. Violations of either section 274B of the INA or Title VII may also lead to the termination of its participation in E-Verify. If the Employer has any questions relating to the anti-discrimination provision, it should contact OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).
15. The Employer agrees that it will use the information it receives from E-Verify (through its Web Services E-Verify Employer Agent) only to confirm the employment eligibility of employees as authorized by this MOU. The Employer agrees that it will safeguard this information, and means of access to it (such as Personal Identification Numbers and passwords), to ensure that it is not used for any other purpose and as necessary to protect its confidentiality, including ensuring that it is not disseminated to any person other than employees of the Employer who are authorized to perform the Employer's responsibilities under this MOU except for such dissemination as may be authorized in advance by SSA or DHS for legitimate purposes.
16. The Employer agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email at E-Verify@uscis.dhs.gov. Please use "Privacy Incident - Password" in the subject line of your email when sending a breach report to E-Verify.
17. The Employer acknowledges that the information it receives from SSA through its Web Services E-Verify Employer Agent is governed by the Privacy Act (5 U.S.C. Section 552a(i)(1) and (3)) and the Social Security Act (42 U.S.C. 1306(a)). Any person who obtains this information under false pretenses or uses it for any purpose other than as provided for in this MOU may be subject to criminal penalties.
18. The Employer agrees to cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, which includes permitting DHS, SSA, their contractors and other agents, upon reasonable notice, to review Forms I-9 and other employment records and to interview it and its employees regarding the Employer's use of E-Verify, and to respond in a prompt and accurate manner to DHS requests for information relating to their participation in E-Verify.
19. The Employer shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The Employer shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your E-Verify services and any claim to that effect is false.
20. The Employer shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the prior written consent of DHS.
21. The Employer agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see M-795 ([Web](#))) and, other than pursuant to the specific terms of such license, may not be used in any manner that might imply that the Employer's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.
22. The Employer understands that if it uses E-Verify procedures for any purpose other than as authorized by

this MOU, the Employer may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.

## **B. RESPONSIBILITIES OF THE WEB SERVICES E-VERIFY EMPLOYER AGENT**

1. The Web Services E-Verify Employer Agent agrees to complete its Web Services interface no later than six months after the date the Web Services User signs this MOU. E-Verify considers your interface to be complete once it has been built pursuant to the Interface Control Agreement (ICA), submitted to E-Verify for testing, and approved for system access.
2. The Web Services E-Verify Employer Agent agrees to perform sufficient maintenance on the Web Services interface in accordance with the requirements listed in the ICA. These requirements include, but are not limited to, updating the Web Services interface to ensure that any updates or enhancements are incorporated no later than six months after the issuance of an ICA. Web Services E-Verify Employer Agents should be aware that this will require the investment of time and resources. Compliance with the requirements of the ICA must be carried out to the satisfaction of DHS and or its assignees.
3. The Web Services E-Verify Employer Agent agrees to provide to SSA and/or DHS the names, titles, addresses, e-mail addresses, and telephone numbers of the Web Services E-Verify Employer Agent representative who will access information, as well as ensure cooperation, communication, and coordination with E-Verify. In addition, Web Services E-Verify Employer Agents must provide to SSA and/or DHS the names, titles, addresses, and telephone numbers of its clients and their staff who will access information through E-Verify. Web Services E-Verify Employer Agents must ensure the contact information is updated with SSA and DHS whenever the points of contact change.
4. The Web Services E-Verify Employer Agent agrees to become familiar with and comply with the E-Verify User Manual and provide a copy of the most current version of the manual to the Employer so that the Employer can become familiar with and comply with E-Verify policy and procedures. The Web Services E-Verify Employer Agent agrees to obtain a revised E-Verify User Manual as it becomes available and to provide a copy of the revised version to the Employer no later than 30 days after the manual becomes available.
5. The Web Services E-Verify Employer Agent agrees that any person accessing E-Verify on its behalf is trained on the most recent E-Verify policy and procedures.
6. The Web Services E-Verify Employer Agent agrees that any of its representatives who will perform employment verification cases will complete the E-Verify Tutorial before that individual initiates any cases.
  - A. The Web Services E-Verify Employer Agent agrees that all of its representatives will take the refresher tutorials initiated by E-Verify as a condition of continued use of E-Verify, including any tutorials for Federal contractors, if any of the Employers represented by the Web Services E-Verify Employer Agent is a Federal contractor.
  - B. Failure to complete a refresher tutorial will prevent the Web Services E-Verify Employer Agent and Employer from continued use of E-Verify.
7. The Web Services E-Verify Employer Agent agrees to grant E-Verify access only to current employees who need E-Verify access. The Web Services E-Verify Employer Agent must promptly terminate an employee's E-Verify access if the employee is separated from the company or no longer needs access to E-Verify.
8. The Web Services E-Verify Employer Agent agrees to obtain the necessary equipment to use E-Verify as required by the E-Verify rules and regulations as modified from time to time.
9. The Web Services E-Verify Employer Agent agrees to, consistent with applicable laws, regulations, and policies, commit sufficient personnel and resources to meet the requirements of this MOU.
10. The Web Services E-Verify Employer Agent agrees to provide its clients with training on E-Verify processes, policies, and procedures. The E-Verify Employer Agent also agrees to provide its clients with ongoing E-Verify training as needed. E-Verify is not responsible for providing training to clients of E-Verify Employer Agents.
11. The Web Services E-Verify Employer Agent agrees to provide the Employer with the notices described in Article II.B.2 below.
12. The Web Services E-Verify Employer Agent agrees to create E-Verify cases for the Employer it represents in accordance with the E-Verify Manual, the E-Verify Web-Based Tutorial and all other published E-Verify rules and procedures. The Web Services E-Verify Employer Agent will create E-Verify cases using information provided by the Employer and will immediately communicate the response back to the Employer. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the Web Services E-Verify Employer Agent's attempting, in good faith, to make inquiries on behalf of the Employer during the period of unavailability. If, however, the Web Services interface is unavailable due to no fault of E-Verify, then the three-day time period is not extended. In such a case, the Web Services E-Verify Employer Agent must use the E-Verify browser during the outage.

13. The Web Services E-Verify Employer Agent agrees to ensure that all notices, referral letters and any other materials otherwise including instructions regarding tentative nonconfirmations, will be consistent with the most current E-Verify tentative nonconfirmation notices and referral letters, which are available on E-Verify's website.
14. The Web Services E-Verify Employer Agent agrees that any system or interface it develops will follow the steps for creating E-Verify cases and processing tentative nonconfirmations, as laid out in the ICA, this MOU and the User Manual, including but not limited to allowing an employer to close an invalid case where appropriate, allowing an employer to refer a tentative nonconfirmation only when an employee chooses to contest a tentative nonconfirmation (no automatic referrals), and referring a tentative nonconfirmation to the appropriate agency at the time the employer prints the referral letter and provides the letter to the employee. The Web Services E-Verify Employer Agent understands that any failure to make its system or interface consistent with proper E-Verify procedures can result in DHS terminating the Web Services E-Verify Employer Agent's agreement and access with or without notice.
15. When the Web Services E-Verify Employer Agent receives notice from a client company that it has received a contract with the FAR clause, then the Web Services E-Verify Employer Agent must update the company's E-Verify profile within 30 days of the contract award date.
16. If data is transmitted between the Web Services E-Verify Employer Agent and its client, then the Web Services E-Verify Employer Agent agrees to protect personally identifiable information during transmission to and from the Web Services E-Verify Employer Agent.
17. The Web Services E-Verify Employer Agent agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email at . Please use "Privacy Incident - Password" in the subject line of your email when sending a breach report to E-Verify.
18. The Web Services E-Verify Employer Agent agrees to fully cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, including permitting DHS, SSA, their contractors and other agents, upon reasonable notice, to review Forms I-9, employment records, and all records pertaining to the Web Services E-Verify Employer Agent's use of E-Verify, and to interview it and its employees regarding the use of E-Verify, and to respond in a timely and accurate manner to DHS requests for information relating to their participation in E-Verify.
  - A. The Web Services E-Verify Employer Agent agrees to cooperate with DHS if DHS requests information about the Web Services E-Verify Employer Agent's interface, including requests by DHS to view the actual interface operated by the Web Services E-Verify Employer Agent as well as related business documents. The Web Services E-Verify Employer Agent agrees to demonstrate for DHS the functionality of its interface to E-Verify upon request.
  - B. The Web Services E-Verify Employer Agent agrees to demonstrate, if requested by DHS, that it has provided training to its clients that meets E-Verify standards. Training programs must provide a focused study of the topics covered in the E-Verify User Manual and pertinent Supplemental Guides. Furthermore, training programs and materials must be updated as E-Verify changes occur. The Web Services E-Verify Employer Agent is encouraged to incorporate information from existing E-Verify materials, including the Enrollment Quick Reference Guide, the E-Verify Employer Agent Client Handbook (formerly known as the Designated Agent Client Handbook), and existing tutorials and manuals into their training program. E-Verify also encourages the Web Services E-Verify Employer Agent to supervise first-time use of the E-Verify browser or Web Services interface by its staff and Employer clients as part of any training program. The Web Services E-Verify Employer Agent agrees to submit its training program materials to DHS for review upon request.

Failure to provide adequate training could, in some instances, lead to penalties as described in Article V.F.1. of this MOU.
19. The Web Services E-Verify Employer Agent shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The Web Services E-Verify Employer Agent shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your Web Services E-Verify Employer Agent services and any claim to that effect is false.
20. The Web Services E-Verify Employer Agent shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the prior written consent of DHS.
21. The Web Services E-Verify Employer Agent agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see ) and, other than pursuant to the specific terms of such license, may not

be used in any manner that might imply that the Web Services E-Verify Employer Agent's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.

22. The Web Services E-Verify Employer Agent understands that if it uses E-Verify procedures for any purpose other than as authorized by this MOU, the Web Services E-Verify Employer Agent may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.

### C. RESPONSIBILITIES OF FEDERAL CONTRACTORS

The Web Services E-Verify Employer Agent shall ensure that the Web Services E-Verify Employer Agent and the Employers it represents carry out the following responsibilities if the Employer is a Federal contractor or becomes a federal contractor. The Web Services E-Verify Employer Agent should instruct the client to keep the Web Services E-Verify Employer Agent informed about any changes or updates related to federal contracts. It is the Web Services E-Verify Employer Agent's responsibility to ensure that its clients are in compliance with all E-Verify policies and procedures.

1. If the Employer is a Federal contractor with the FAR E-Verify clause subject to the employment verification terms in Subpart 22.18 of the FAR, it will become familiar with and comply with the most current version of the E-Verify User Manual for Federal Contractors as well as the E-Verify Supplemental Guide for Federal Contractors.
2. In addition to the responsibilities of every employer outlined in this MOU, the Employer understands that if it is a Federal contractor subject to the employment verification terms in Subpart 22.18 of the FAR it must verify the employment eligibility of any "employee assigned to the contract" (as defined in FAR 22.1801). Once an employee has been verified through E-Verify by the Employer, the Employer may not reverify the employee through E-Verify.
  - A. An Employer that is not enrolled in E-Verify as a Federal contractor at the time of a contract award must enroll as a Federal contractor in the E-Verify program within 30 calendar days of contract award and, within 90 days of enrollment, begin to verify employment eligibility of new hires using E-Verify. The Employer must verify those employees who are working in the United States, whether or not they are assigned to the contract. Once the Employer begins verifying new hires, such verification of new hires must be initiated within three business days after the hire date. Once enrolled in E-Verify as a Federal contractor, the Employer must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.
  - B. Employers enrolled in E-Verify as a Federal contractor for 90 days or more at the time of a contract award must use E-Verify to begin verification of employment eligibility for new hires of the Employer who are working in the United States, whether or not assigned to the contract, within three business days after the date of hire. If the Employer is enrolled in E-Verify as a Federal contractor for 90 calendar days or less at the time of contract award, the Employer must, within 90 days of enrollment, begin to use E-Verify to initiate verification of new hires of the contractor who are working in the United States, whether or not assigned to the contract. Such verification of new hires must be initiated within three business days after the date of hire. An Employer enrolled as a Federal contractor in E-Verify must begin verification of each employee assigned to the contract within 90 calendar days after date of contract award or within 30 days after assignment to the contract, whichever is later.
  - C. Federal contractors that are institutions of higher education (as defined at 20 U.S.C. 1001(a)), state or local governments, governments of Federally recognized Indian tribes, or sureties performing under a takeover agreement entered into with a Federal agency under a performance bond may choose to only verify new and existing employees assigned to the Federal contract. Such Federal contractors may, however, elect to verify all new hires, and/or all existing employees hired after November 6, 1986. Employers in this category must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.
  - D. Upon enrollment, Employers who are Federal contractors may elect to verify employment eligibility of all existing employees working in the United States who were hired after November 6, 1986, instead of verifying only those employees assigned to a covered Federal contract. After enrollment, Employers must elect to verify existing staff following DHS procedures and begin E-Verify verification of all existing employees within 180 days after the election.
  - E. The Employer may use a previously completed Form I-9 as the basis for creating an E-Verify case for an employee assigned to a contract as long as:
    - i. That Form I-9 is complete (including the SSN) and complies with Article II.A.6,
    - ii. The employee's work authorization has not expired, and

iii. The Employer has reviewed the information reflected in the Form I-9 either in person or in communications with the employee to ensure that the employee's Section 1, Form I-9 attestation has not changed (including, but not limited to, a lawful permanent resident alien having become a naturalized U.S. citizen).

F. The Employer shall complete a new Form I-9 consistent with Article II.A.6 or update the previous Form I-9 to provide the necessary information if:

- i. The Employer cannot determine that Form I-9 complies with Article II.A.6,
- ii. The employee's basis for work authorization as attested in Section 1 has expired or changed, or
- iii. The Form I-9 contains no SSN or is otherwise incomplete.

Note: If Section 1 of Form I-9 is otherwise valid and up-to-date and the form otherwise complies with Article II.C.5, but reflects documentation (such as a U.S. passport or Form I-551) that expired after completing Form I-9, the Employer shall not require the production of additional documentation, or use the photo screening tool described in Article II.A.5, subject to any additional or superseding instructions that may be provided on this subject in the E-Verify User Manual.

G. The Employer agrees not to require a second verification using E-Verify of any assigned employee who has previously been verified as a newly hired employee under this MOU or to authorize verification of any existing employee by any Employer that is not a Federal contractor based on this Article.

3. The Employer understands that if it is a Federal contractor, its compliance with this MOU is a performance requirement under the terms of the Federal contract or subcontract, and the Employer consents to the release of information relating to compliance with its verification responsibilities under this MOU to contracting officers or other officials authorized to review the Employer's compliance with Federal contracting requirements.

#### **D. RESPONSIBILITIES OF SSA**

1. SSA agrees to allow DHS to compare data provided by the Employer (through the E-Verify Employer Agent) against SSA's database. SSA sends DHS confirmation that the data sent either matches or does not match the information in SSA's database.
2. SSA agrees to safeguard the information the Employer provides (through the E-Verify Employer Agent) through E-Verify procedures. SSA also agrees to limit access to such information, as is appropriate by law, to individuals responsible for the verification of Social Security numbers or responsible for evaluation of E-Verify or such other persons or entities who may be authorized by SSA as governed by the Privacy Act (5 U.S.C. Section 552a), the Social Security Act (42 U.S.C. 1306(a)), and SSA regulations (20 CFR Part 401).
3. SSA agrees to provide case results from its database within three Federal Government work days of the initial inquiry. E-Verify provides the information to the E-Verify Employer Agent.
4. SSA agrees to update SSA records as necessary if the employee who contests the SSA tentative nonconfirmation visits an SSA field office and provides the required evidence. If the employee visits an SSA field office within the eight Federal Government work days from the date of referral to SSA, SSA agrees to update SSA records, if appropriate, within the eight-day period unless SSA determines that more than eight days may be necessary. In such cases, SSA will provide additional instructions to the employee. If the employee does not visit SSA in the time allowed, E-Verify may provide a final nonconfirmation to the E-Verify Employer Agent.

Note: If an Employer experiences technical problems, or has a policy question, the employer should contact E-Verify at 1-888-464-4218.

#### **E. RESPONSIBILITIES OF DHS**

1. DHS agrees to provide the Employer with selected data from DHS databases to enable the Employer (through the E-Verify Employer Agent) to conduct, to the extent authorized by this MOU:
  - A. Automated verification checks on alien employees by electronic means, and
  - B. Photo verification checks (when available) on employees.
2. DHS agrees to assist the E-Verify Employer Agent with operational problems associated with its participation in E-Verify. DHS agrees to provide the E-Verify Employer Agent names, titles, addresses, and telephone numbers of DHS representatives to be contacted during the E-Verify process.
3. DHS agrees to provide to the E-Verify Employer Agent with access to E-Verify training materials as well as

an E-Verify User Manual that contain instructions on E-Verify policies, procedures, and requirements for both SSA and DHS, including restrictions on the use of E-Verify.

4. DHS agrees to train E-Verify Employer Agents on all important changes made to E-Verify through the use of mandatory refresher tutorials and updates to the E-Verify User Manual. Even without changes to E-Verify, DHS reserves the right to require E-Verify Employer Agents to take mandatory refresher tutorials.
5. DHS agrees to provide to the Employer (through the E-Verify Employer Agent) a notice, which indicates the Employer's participation in E-Verify. DHS also agrees to provide to the Employer anti-discrimination notices issued by the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC), Civil Rights Division, U.S. Department of Justice.
6. DHS agrees to issue each of the E-Verify Employer Agent's E-Verify users a unique user identification number and password that permits them to log in to E-Verify.
7. DHS agrees to safeguard the information the Employer provides (through the E-Verify Employer Agent), and to limit access to such information to individuals responsible for the verification process, for evaluation of E-Verify, or to such other persons or entities as may be authorized by applicable law. Information will be used only to verify the accuracy of Social Security numbers and employment eligibility, to enforce the INA and Federal criminal laws, and to administer Federal contracting requirements.
8. DHS agrees to provide a means of automated verification that provides (in conjunction with SSA verification procedures) confirmation or tentative nonconfirmation of employees' employment eligibility within three Federal Government work days of the initial inquiry.
9. DHS agrees to provide a means of secondary verification (including updating DHS records) for employees who contest DHS tentative nonconfirmations and photo mismatch tentative nonconfirmations. This provides final confirmation or nonconfirmation of the employees' employment eligibility within 10 Federal Government work days of the date of referral to DHS, unless DHS determines that more than 10 days may be necessary. In such cases, DHS will provide additional verification instructions.

### ARTICLE III

#### REFERRAL OF INDIVIDUALS TO SSA AND DHS

##### A. REFERRAL TO SSA

1. If the Employer receives a tentative nonconfirmation issued by SSA, the Employer must print the notice as directed by E-Verify. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.
2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.
3. After a tentative nonconfirmation, the Employer will refer employees to SSA field offices only as directed by E-Verify. The Employer must record the case verification number, review the employee information submitted to E-Verify to identify any errors, and find out whether the employee contests the tentative nonconfirmation. The Employer will transmit the Social Security number, or any other corrected employee information that SSA requests, to SSA for verification again if this review indicates a need to do so.
4. The Employer will instruct the employee to visit an SSA office within eight Federal Government work days. SSA will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.
5. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.
6. The Employer agrees not to ask the employee to obtain a printout from the Social Security Administration number database (the Numident) or other written verification of the SSN from the SSA.

##### B. REFERRAL TO DHS

1. If the Employer receives a tentative nonconfirmation issued by DHS, the Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to

contest the finding, while their case is still pending.

2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.
3. The Employer agrees to refer individuals to DHS only when the employee chooses to contest a tentative nonconfirmation.
4. If the employee contests a tentative nonconfirmation issued by DHS, the Employer will instruct the employee to contact DHS through its toll-free hotline (as found on the referral letter) within eight Federal Government work days.
5. If the Employer finds a photo mismatch, the Employer must provide the photo mismatch tentative nonconfirmation notice and follow the instructions outlined in paragraph 1 of this section for tentative nonconfirmations, generally.
6. The Employer agrees that if an employee contests a tentative nonconfirmation based upon a photo mismatch, the Employer will send a copy of the employee's Form I-551, Form I-766, U.S. Passport, or passport card to DHS for review by:
  - A. Scanning and uploading the document, or
  - B. Sending a photocopy of the document by express mail (furnished and paid for by the employer).
7. The Employer understands that if it cannot determine whether there is a photo match/mismatch, the Employer must forward the employee's documentation to DHS as described in the preceding paragraph. The Employer agrees to resolve the case as specified by the DHS representative who will determine the photo match or mismatch.
8. DHS will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.
9. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

#### **ARTICLE IV**

#### **SERVICE PROVISIONS**

##### **A. NO SERVICE FEES**

1. SSA and DHS will not charge the Employer or the Web Services E-Verify Employer Agent for verification services performed under this MOU. The Employer is responsible for providing equipment needed to make inquiries. To access E-Verify, an Employer will need a personal computer with Internet access.

#### **ARTICLE V**

#### **SYSTEM SECURITY AND MAINTENANCE**

##### **A. DEVELOPMENT REQUIREMENTS**

1. Software developed by Web Services E-Verify Employer Agents must comply with federally-mandated information security policies and industry security standards to include but not limited to:
2. Public Law 107-347, "E-Government Act of 2002, Title III, Federal Information Security Management Act (FISMA)," December 2002.
3. Office of Management and Budget (OMB) Memorandum (M-10-15), "FY 2010 Reporting Instructions for the Federal Information Security Management Act and Agency Privacy Management," April 2010.
4. National Institute of Standards and Technology (NIST) Special Publication (SP) and Federal Information Processing Standards Publication (FIPS).
5. International Organization for Standardization/International Electrotechnical Commission (ISO/IEC) 27002, Information Technology - Security Techniques - Code of Practice for Information Security Management.
6. The Web Services E-Verify Employer Agent agrees to update its Web Services interface to reflect system enhancements within six months from the date DHS notifies the Web Services User of the system update. The Web Services User will receive notice from DHS in the form of an Interface Control Agreement (ICA). The Web Services E-Verify Employer Agent agrees to institute changes to its interface as identified in the ICA, including all functionality identified and all data elements detailed therein.
7. The Web Services E-Verify Employer Agent agrees to demonstrate progress of its efforts to update its Web Services interface if and when DHS requests such progress reports.

8. The Web Services E-Verify Employer Agent acknowledges that if its system enhancements are not completed to the satisfaction of DHS or its assignees within six months from the date DHS notifies the Web Services User of the system update, then the Web Services User's E-Verify account may be suspended, and support for previous releases of E-Verify may no longer be available to the Web Services User. The Web Services E-Verify Employer Agent also acknowledges that DHS may suspend the Web Services User's account after the six-month period has elapsed.
9. The Web Services E-Verify Employer Agent agrees to incorporate error handling logic into its development or software to accommodate and act in a timely fashion should an error code be returned.
10. The Web Services E-Verify Employer Agent agrees to complete the technical requirements testing which is confirmed upon receiving approval of test data and connectivity between the Web Services E-Verify Employer Agent and DHS.
11. DHS will not reimburse any Web Services E-Verify Employer Agent or software developer who has expended resources in the development or maintenance of a Web Services interface if that party is unable, or becomes unable, to meet any of the requirements set forth in this MOU.
12. Housing, development, infrastructure, maintenance, and testing of the Web Services applications may take place outside the United States and its territories, but testing must be conducted to ensure that the code is correct and secure.
13. If the Web Services E-Verify Employer Agent includes an electronic Form I-9 as part of its interface, then it must comply with the standards for electronic retention of Form I-9 found in 8 CFR 274a.2(e).

## **B. INFORMATION SECURITY REQUIREMENTS**

Web Services E-Verify Employer Agents performing verification services under this MOU must ensure that information that is shared between the Web Services E-Verify Employer Agent and DHS is appropriately protected comparable to the protection provided when the information is within the DHS environment [OMB Circular A-130 Appendix III].

To achieve this level of information security, the Web Services E-Verify Employer Agent agrees to institute the following procedures:

1. Conduct periodic assessments of risk, including the magnitude of harm that could result from the unauthorized access, use, disclosure, disruption, modification, or destruction of information and information systems that support the operations and assets of the DHS, SSA, and the Web Services E-Verify Employer Agent and its clients;
2. Develop policies and procedures that are based on risk assessments, cost-effectively reduce information security risks to an acceptable level, and ensure that information security is addressed throughout the life cycle of each organizational information system;
3. Implement subordinate plans for providing adequate information security for networks, facilities, information systems, or groups of information systems, as appropriate;
4. Conduct security awareness training to inform the Web Services E-Verify Employer Agent's personnel (including contractors and other users of information systems that support the operations and assets of the organization) of the information security risks associated with their activities and their responsibilities in complying with organizational policies and procedures designed to reduce these risks;
5. Develop periodic testing and evaluation of the effectiveness of information security policies, procedures, practices, and security controls to be performed with a frequency depending on risk, but no less than once per year;
6. Develop a process for planning, implementing, evaluating, and documenting remedial actions to address any deficiencies in the information security policies, procedures, and practices of the organization;
7. Implement procedures for detecting, reporting, and responding to security incidents;
8. Create plans and procedures to ensure continuity of operations for information systems that support the operations and assets of the organization;
9. In information-sharing environments, the information owner is responsible for establishing the rules for appropriate use and protection of the subject information and retains that responsibility even when the information is shared with or provided to other organizations [NIST SP 800-37].
10. DHS reserves the right to restrict Web Services calls from certain IP addresses.
11. DHS reserves the right to audit the Web Services E-Verify Employer Agent's application.
12. Web Services E-Verify Employer Agents and Software Developers agree to cooperate willingly with the DHS assessment of information security and privacy practices used by the company to develop and maintain the



software.

### C. DATA PROTECTION AND PRIVACY REQUIREMENTS

1. Web Services E-Verify Employer Agents must practice proper Internet security; this means using HTTP over SSL/TLS (also known as HTTPS) when accessing DHS information resources such as E-Verify [NIST SP 800-95]. Internet security practices like this are necessary because Simple Object Access Protocol (SOAP), which provides a basic messaging framework on which Web Services can be built, allows messages to be viewed or modified by attackers as messages traverse the Internet and is not independently designed with all the necessary security protocols for E-Verify use.
2. In accordance with DHS standards, the Web Services E-Verify Employer Agent agrees to maintain physical, electronic, and procedural safeguards to appropriately protect the information shared under this MOU against loss, theft, misuse, unauthorized access, and improper disclosure, copying use, modification or deletion.
3. Any data transmission requiring encryption shall comply with the following standards:
  - A. Products using FIPS 197 Advanced Encryption Standard (AES) algorithms with at least 256-bit encryption that has been validated under FIPS 140-2.
  - B. NSA Type 2 or Type 1 encryption.
4. User ID Management (Set Standard): All information exchanged between the parties under this MOU will be done only through authorized Web Services E-Verify Employer Agent representatives identified above.
5. The Web Services E-Verify Employer Agent agrees to use the E-Verify browser instead of its own interface if it has not yet upgraded its interface to comply with the Federal Acquisition Regulation (FAR) system changes. In addition, Web Services E-Verify Employer Agents whose interfaces do not support the Form I-9 from 2/2/2009 or 8/7/2009 should also use the E-Verify browser until the system upgrade is completed.
6. The Web Services E-Verify Employer Agent agrees to use the E-Verify browser instead of its own interface if it has not completed updates to its system within six months from the date DHS notifies the Web Services E-Verify Employer Agent of the system update. The Web Services E-Verify Employer Agent can resume use of its interface once it is up-to-date, unless the Web Services E-Verify Employer Agent has been suspended or terminated from continued use of the system.

### D. COMMUNICATIONS

1. Web Services E-Verify Employer Agents and Software Developers agree to develop an electronic system that is not subject to any agreement that would restrict access to and use of by an agency of the United States.
2. The Web Services E-Verify Employer Agent agrees to develop effective controls to ensure the integrity, accuracy and reliability of its electronic system.
3. The Web Services E-Verify Employer Agent agrees to develop an inspection and quality assurance program that regularly, at least once per year, evaluates the electronic system, and includes periodic checks of electronically stored information. The Web Services E-Verify Employer Agent agrees to share the results of its regular inspection and quality assurance program with DHS upon request.
4. The Web Services E-Verify Employer Agent agrees to develop an electronic system with the ability to produce legible copies of applicable notices, letters, etc.
5. All information exchanged between the parties under this MOU will be in accordance with applicable laws, regulations, and policies, including but not limited to, information security guidelines of the sending party with respect to any information that is deemed Personally Identifiable Information (PII), including but not limited to the employee or applicant's Social Security number, alien number, date of birth, or other information that may be used to identify the individual.
6. Suspected and confirmed information security breaches must be reported to DHS according to Article II.A.17. Reporting such breaches does not relieve the Web Services E-Verify Employer Agent from further requirements as directed by state and local law. The Web Services E-Verify Employer Agent is subject to applicable state laws regarding data protection and incident reporting in addition to the requirements herein.

### E. SOFTWARE DEVELOPER RESTRICTIONS

1. The Web Services E-Verify Employer Agent agrees that if it develops a Web Services interface and sells such interface, then it can be held liable for any misuse by the company that purchases the interface. It is the responsibility of the Web Services E-Verify Employer Agent to ensure that its interface is used in accordance with E-Verify policies and procedures.

2. The Web Services E-Verify Employer Agent agrees to provide software updates to each client who purchases its software. Because of the frequency Web Services updates, an ongoing relationship between the software developer and the client is necessary.
3. DHS reserves the right to terminate the access of any software developer with or without notice who creates or uses an interface that does not comply with E-Verify procedures.
4. Web Services Software Developers pursuing software development independent of serving clients as a Web Services E-Verify Employer Agent are not eligible to receive an ICA. At this time, E-Verify does not permit Web Services software development without also being a Web Services E-Verify Employer Agent or Web Services Employer.

#### F. PENALTIES

1. The Web Services E-Verify Employer Agent agrees that any failure on its part to comply with the terms of the MOU may result in account suspension, termination, or other adverse action.
2. DHS is not liable for any financial losses to Web Services E-Verify Employer Agent, its clients, or any other party as a result of your account suspension or termination.

### ARTICLE VI

#### MODIFICATION AND TERMINATION

##### A. MODIFICATION

1. This MOU is effective upon the signature of all parties and shall continue in effect for as long as the SSA and DHS operates the E-Verify program unless modified in writing by the mutual consent of all parties.
2. Any and all E-Verify system enhancements by DHS or SSA, including but not limited to E-Verify checking against additional data sources and instituting new verification policies or procedures, will be covered under this MOU and will not cause the need for a supplemental MOU that outlines these changes.

##### B. TERMINATION

1. The Web Services E-Verify Employer Agent may terminate this MOU and its participation in E-Verify at any time upon 30 days prior written notice to the other parties. In addition, any Employer represented by the Web Services E-Verify Employer Agent may voluntarily terminate its MOU upon giving DHS 30 days' written notice. The Web Services E-Verify Employer Agent may not refuse to terminate the Employer based upon an outstanding bill for verification services.
2. Notwithstanding Article V, part A of this MOU, DHS may terminate this MOU, and thereby the Web Services E-Verify Employer Agent's participation in E-Verify, with or without notice at any time if deemed necessary because of the requirements of law or policy, or upon a determination by SSA or DHS that there has been a breach of system integrity or security by the Web Services E-Verify Employer Agent or Employer, or a failure on the part of either party to comply with established E-Verify procedures and/or legal requirements. The Employer understands that if it is a Federal contractor, termination of this MOU by any party for any reason may negatively affect the performance of its contractual responsibilities. Similarly, the Employer understands that if it is in a state where E-Verify is mandatory, termination of this by any party MOU may negatively affect the Employer's business.
3. A Web Services E-Verify Employer Agent for an Employer that is a Federal contractor may terminate this MOU when the Federal contract that requires its participation in E-Verify is terminated or completed. In such cases, the Web Services E-Verify Employer Agent must provide written notice to DHS. If the Web Services E-Verify Employer Agent fails to provide such notice, then that Employer will remain an E-Verify participant, will remain bound by the terms of this MOU that apply to non-Federal contractor participants, and will be required to use the E-Verify procedures to verify the employment eligibility of all newly hired employees.
4. The Web Services E-Verify Employer Agent agrees that E-Verify is not liable for any losses, financial or otherwise, if the Web Services E-Verify Employer Agent or the Employer is terminated from E-Verify.

### ARTICLE VII

#### PARTIES

- A. Some or all SSA and DHS responsibilities under this MOU may be performed by contractor(s), and SSA and DHS may adjust verification responsibilities between each other as necessary. By separate agreement with DHS, SSA has agreed to perform its responsibilities as described in this MOU.
- B. Nothing in this MOU is intended, or should be construed, to create any right or benefit, substantive or procedural, enforceable at law by any third party against the United States, its agencies, officers, or employees, or against the Web Services E-Verify Employer Agent, its agents, officers, or employees.

- C. The Web Services E-Verify Employer Agent may not assign, directly or indirectly, whether by operation of law, change of control or merger, all or any part of its rights or obligations under this MOU without the prior written consent of DHS, which consent shall not be unreasonably withheld or delayed. Any attempt to sublicense, assign, or transfer any of the rights, duties, or obligations herein is void.
- D. Each party shall be solely responsible for defending any claim or action against it arising out of or related to E-Verify or this MOU, whether civil or criminal, and for any liability wherefrom, including (but not limited to) any dispute between the Web Services E-Verify Employer Agent or the Employer and any other person or entity regarding the applicability of Section 403(d) of IIRIRA to any action taken or allegedly taken by the Web Services E-Verify Employer Agent or the Employer.
- E. The Web Services E-Verify Employer Agent understands that its participation in E-Verify is not confidential information and may be disclosed as authorized or required by law and DHS or SSA policy, including but not limited to, Congressional oversight, E-Verify publicity and media inquiries, determinations of compliance with Federal contractual requirements, and responses to inquiries under the Freedom of Information Act (FOIA).
- F. The individuals whose signatures appear below represent that they are authorized to enter into this MOU on behalf of the Employer, the Web Services E-Verify Employer Agent and DHS respectively. The Web Services E-Verify Employer Agent understands that any inaccurate statement, representation, data or other information provided to DHS may subject the Web Services E-Verify Employer Agent, as the case may be, its subcontractors, its employees, or its representatives to: (1) prosecution for false statements pursuant to 18 U.S.C. 1001 and/or; (2) immediate termination of its MOU and/or; (3) possible debarment or suspension.
- G. The foregoing constitutes the full agreement on this subject between DHS, the Employer, and the E-Verify Employer Agent. HR Green, Inc (Employer) hereby designates and appoints Ken Scott (E-Verify Employer Agent), including its officers and employees, as the E-Verify Employer Agent for the purpose of carrying out (Employer) responsibilities under the MOU between the Employer, the E-Verify Employer Agent, and DHS.

Company ID Number:65719

Client Company ID Number:1419805

If you have any questions, contact E-Verify at 1-888-464-4218.

Approved by:

Employer	
Name (Please Type or Print)	Title
Signature	Date
E-Verify Employer Agent SilkRoad Technology, Inc.	
Name (Please Type or Print)	Title
Ken Scott	
Signature	Date
Electronically Signed	February 04, 2022
Department of Homeland Security - Verification Division	
Name	Title
Signature	Date

Company ID Number:65719

Client Company ID Number:1419805

<b>Information Required for the E-Verify Program</b>	
<b>Information relating to your Company:</b>	
Company Name	HR Green, Inc
Company Facility Address	8710 Earhart Lane SW Cedar Rapids, IA 52404
Company Alternate Address	8710 Earhart Lane SW Cedar Rapids, IA 52404
County or Parish	Linn
Employer Identification Number	42-0927178
North American Industry Classification Systems Code	Professional, Scientific, And Technical Services (541)
Parent Company	
Number of Employees	500 to 999
Number of Sites Verified for	14

Company ID Number:65719

Client Company ID Number:1419805

**Are you verifying for more than 1 site? If yes, please provide the number of sites verified for in each State:**

Iowa	2
Illinois	5
Texas	1
California	1
Minnesota	1
Missouri	1
South Dakota	1
Colorado	2

Company ID Number:65719

Client Company ID Number:1419805

**Information relating to the Program Administrator(s) for your Company on policy questions or operational problems:**

Name	Erin Dusil
Phone Number	(713) 338-8023
Fax Number	
Email Address	jstrausse@hrgreen.com

Name	Becca Springfield
Phone Number	(713) 338-8056
Fax Number	
Email Address	BSpringfield@hrgreen.com



Building Communities.  
Improving Lives.

# BUILDING & DEVELOPMENT REVIEW (BDRS) ON-CALL SERVICES

**Solicitation 23-0482-RFP**

APRIL 6, 2023

1.7. PROPOSAL / SUBMITTAL DOCUMENTS FOR

**Pinellas County**



**Russ Loebe, ICMA-CM | George A. Wentz, PE**

8710 Earhart Lane SW  
Cedar Rapids, IA 52404-8947

Direct 815.320.7122 + Mobile 815.530.6415 (Russ Loebe)  
949.939.5243 (George Wentz)

[rlloebe@hrgreen.com](mailto:rlloebe@hrgreen.com) | [gwentz@hrgreen.com](mailto:gwentz@hrgreen.com)

## PROPOSED SERVICES

- ▶ Building Permit Plan Review (Remote)
- ▶ Permit Technician Services (Remote)
- ▶ Engineering Site Civil Plan Review (Remote)





HRGreen®

▶ 8710 Earhart Lane SW  
Cedar Rapids, IA 52404-8947  
Phone 319.841.4000

▶ [HRGREEN.COM](http://HRGREEN.COM)

Kevin McAndrew | Director Building and Development Review Services  
Lucy Nowacki | Lead Procurement Analyst  
Pinellas County Government  
315 Court Street, Suite 601  
Clearwater, FL 33756

April 6, 2023

**Re: On-Call Building & Development Review Services (BDRS), Solicitation No. 23-0482-RFP  
Delivering “Best in Class” Concierge-Level Service**

Dear Kevin, Lucy, and Other Selection Committee Members,

We applaud Pinellas County for their continued advancement of cost-effective efficiencies and customer service enhancements within the Building and Development Review Services (BDRS) Department. The new Project Manager framework along with deployment of **Accela** and **Digital Plan Room** should improve efficiencies while improving the customer experience throughout the development process. Additionally, the County’s leveraging third party plan review assistance will help BDRS achieve their applicant turnaround review schedule and other performance metrics.

**HR Green, Inc. (HR Green)** is ideally suited to deliver comprehensive Building and Development plan review services as outlined in our proposal submittal. We are an industry-recognized thought leader and service provider in delivering development review and land development coordination services for counties and cities. We are excited to offer the following service for the County.

- ▶ **Building Permit Plan Review**
- ▶ **Permit Technician Services**
- ▶ **Engineering Site Civil Plan Review**

HR Green staff has implemented and used numerous software solutions (including **Accela** and **Digital Plan Room**) in combination with other software to provide paperless plan review, digital commenting, real-time progress reporting, performance metric tracking, and enhanced collaboration with agency staff and applicants. Our internal **GreenTReX** plan review process serves as the operational foundation to efficiently route, review, and approve plans to assure compliance with your stated delivery criteria. Having worked seamlessly with scores of local governments to review and process building and development plans ranging from complex multi-use projects to homeowner-initiated applications, we stand ready to deliver industry-leading concierge-level plan review service for Pinellas County. Our team of ICC certified Building Officials, registered architects, engineers, floodplain managers, and other professionals are steeped in local government experience and are ready to provide a unified approach to plan reviews and permit processing.

As an employee-owned, Top 200 ENR Design firm with 670+ staff members and a nationwide footprint, HR Green brings a breadth of technical and management capabilities. We live our **Mission Statement of BUILDING COMMUNITIES. IMPROVING LIVES.** as we serve as trusted advisors and solution finders for our clients. Our staff will hit the ground running to provide high quality, responsive, cost-effective, customer-oriented public services for the County. We are pleased to present our qualifications in the attached proposal.

Sincerely,

**HR GREEN, INC.**

**Russ Loebe, ICMA-CM**  
Vice President

**George A. Wentz, PE**  
Vice President

# Executive Summary

## BUILDING PERMIT PLAN REVIEW

Our team of ICC certified building plan reviewers will provide timely and professional reviews of residential and commercial building permit plans for the County. We will provide these virtual services using the County's Accela software platform and electronic plan review (Digital Plan Room) technology. These multi-trade reviews will address areas such as mechanical, plumbing, electrical and plumbing reviews. We do this by:

- ▶ Assigning the same highly qualified plan reviewer to a project from initial review to final approval. This creates critical continuity and rapport between the applicant and the reviewer to better understand and communicate the project's needs, code requirements, and address any deficiencies encountered to help keep the project on track.
- ▶ In addition to your permitting software applications, internally we are consistently monitoring and automating the intake and review process with our **GreenTREN** program. This allows for efficient internal controls of work activity, routing of plans, digital comments, tracking logs, and 24/7 access to project status and more.
- ▶ We work collaboratively with the applicants and our clients seamlessly resulting in timely, accurate and thoughtful reviews.

**Frank Urbina, NCARB, AIA, ALA, APA** will head up a team of seasoned ICC certified plan reviewers for this assignment.

## PERMIT TECHNICIAN SERVICES

Our team of experienced professional Permit Technicians are available to administer the permit and plan workflow throughout the entire application process. Permit Technicians play a vital role from intake through certificate of occupancy. From checking for completeness of applications to verifying accuracy of fees to issuance of certificate of occupancy our Permit Technicians help assure a smooth and efficient permitting process. Our team will be available remotely during your hours of operation Monday through Friday from 7:30 am to 4:30 pm EST, or specialty hours as directed by the County.

- ▶ A team of ICC-certified Permit Technicians that understand permitting processes and administration will provide the support needed for the management of permit intake, routing, and overall document control in the permitting process.
- ▶ Our staff members will verify proper documentation of plan reviews, address customer inquiries and deliver clear communication and seamless processing for your permitting system.
- ▶ Our Permit Technicians not only understand the threshold permit intake processing but also understand the entire permit lifecycle and will interact proactively with applicants and other stakeholders to assure an efficient permitting process.

**Linda Nguyen, Permit Technician** will lead the virtual permit technician support on this assignment.

## ENGINEERING SITE CIVIL PLAN REVIEW

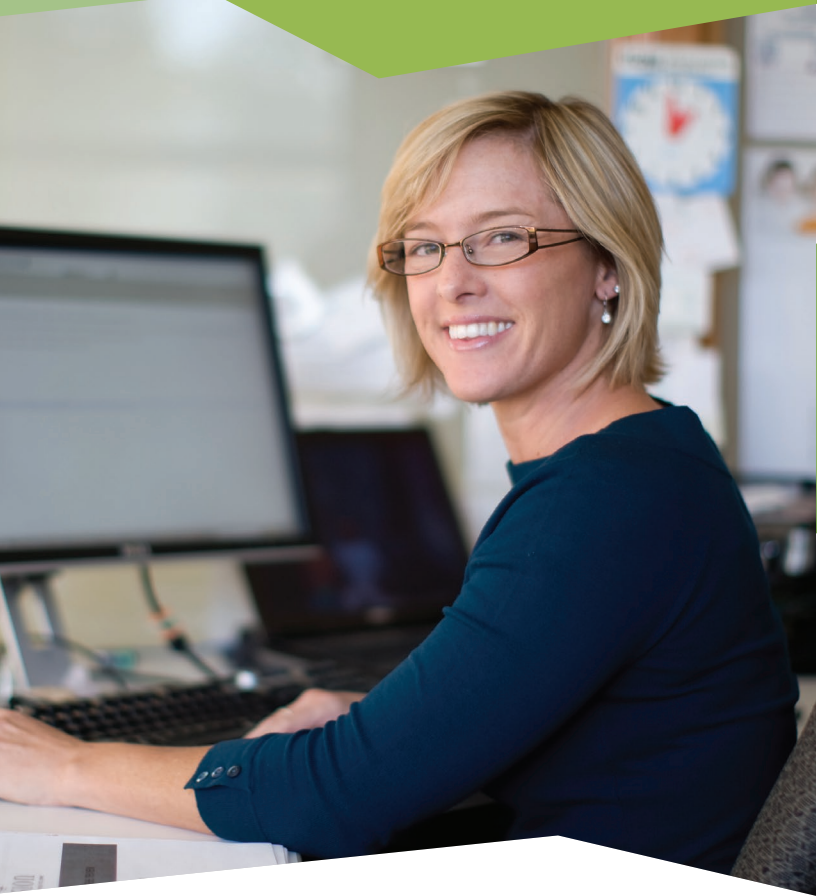
HR Green's team of licensed engineers and other professionals will provide virtual on demand services for reviews of development site plans, right-of-way, use permits, subdivision plats, waivers and related documents regarding transportation, stormwater, floodplain management, and the County's Land Development Code (LDC). We will also be available to participate in virtual permitting meetings with County staff and communicate with other third-party consultants and engineers as directed by the County. Our team members will also be available for virtual meetings as subject matter experts on behalf of the County and will prepare and conduct presentations for County management, stakeholders, or the Board of County Commissioners (BCC) as directed.

- ▶ Our Site(s) Civil plan review team consists of Registered Professional Civil and Structural engineers, technicians, and Certified Floodplain Managers with unparalleled experience with a vast variety of development plans and projects.
- ▶ Team members bring years of plan review experience working both in and for local government agencies. They understand the importance and unique requirements of these development reviews.

# Executive Summary

- ▶ As with our Building Plan Review services, we assign the same highly qualified plan reviewer to a project from initial review to final approval. This creates critical continuity and rapport between the applicant and the reviewer to better understand and communicate the project's needs, code requirements, and address any deficiencies encountered to help keep the project on track.
- ▶ Site civil reviews are also managed internally with our **GreenTREX** program that monitors and automates the intake and review process for added efficiencies, internal controls, routing of plans, digital comments, tracking logs, and 24/7 access to project status and more.

**Tina York, PE** will lead the Site Civil review team.



# 1. QUALIFICATIONS

# 1. QUALIFICATIONS



CELEBRATING  
**110** YEARS



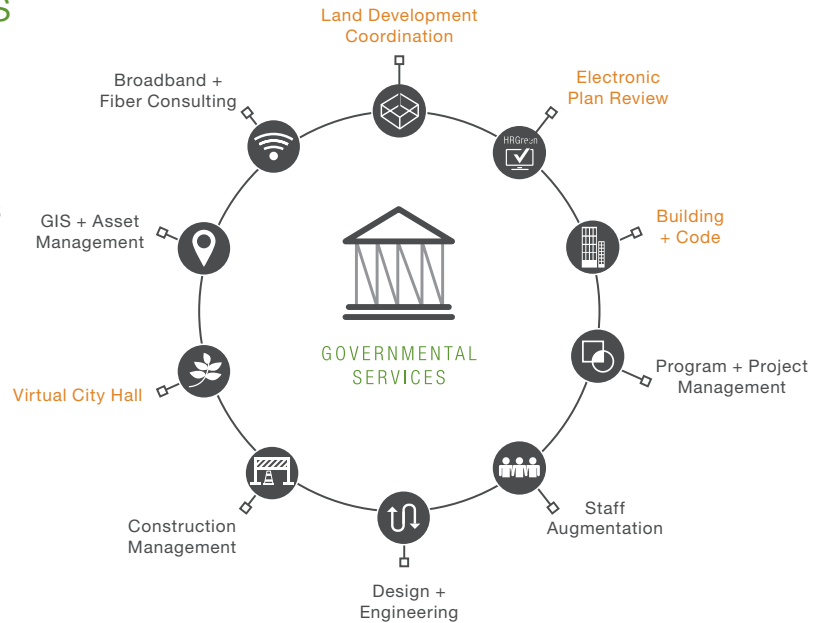
Recognized as a Great Place to Work®-certified company

## Experience and Qualifications

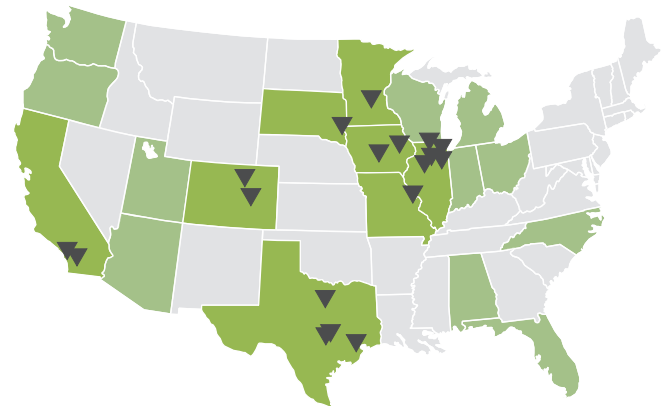
HR Green is honored to be one of the nation's longest operating engineering firms. Established in 1913, HR Green, Inc. is employee owned. We collaborate across geographies and markets to provide the engineering, technical, and management solutions that connect and shape communities and are driven by the commitment of our clients.

### FIRM'S FINANCIAL CONDITION

Green Companies, Inc. is a privately held company owned by its employees and directors. The Company has an available \$10 million Line of Credit with Bankers Trust Company in Cedar Rapids, Iowa. Because of the Company's strong cash flow from Operations, as well as strong fiscal discipline, this available Line has been used sparingly and was zero as of the end of each year since 2014. We continue to have a strong balance sheet, are well capitalized and are well positioned to fulfill all of our obligations. Due to our aggressive financial discipline, our balance sheet remains strong and healthy. We do not have any conditions (e.g., bankruptcy, pending litigation, planned office closures, impending merger) that will impede our ability to complete the contract.



For more than a century, HR Green has been dedicated to providing the services that our clients need to achieve success.



### National Service Area

HR Green has provided services to clients across the United States including engineering consulting work in Florida. We have offices located in: California, Colorado, Iowa, Illinois, Minnesota, Missouri, South Dakota, and Texas. Our future offices include: Arizona, **Florida**, Alabama, and North Carolina.



**670+**  
**EMPLOYEES**

**ENR**  
**TOP 500**  
**Design Firms**

▶ HR Green has continued to climb the rankings on Engineering News Record's (ENR) annual lists of top design firms in the nation (currently #162).



**Building & Development Review (BDRS) On-Call Services, 23-0482-RFP**

▶ Pinellas County

# 1. QUALIFICATIONS

## Comprehensive Services

HR Green has worked with government agencies across the United States for 110 years. We have a proven track record of meeting goals and expectations for our clients. As an employee-owned company, we offer large firm resources with a small firm approach to customer service.

All work will be coordinated through a rigorous quality control program under the direction of **Rick White, PE, a registered Florida Professional Engineer.**

Our building and civil plan check and permit processing services are handled by an unparalleled team, many of whom exclusively provide these services remotely using all manner of electronic plan review software and automated permitting systems. Our development review staff includes professional engineers, registered architects, certified floodplain managers, certified International Code Council (ICC) building officials, reviewers, permit technicians, and Master Code Professionals (MCPs). Based on the County's needs, **HR Green will provide Building Permit Plan Review services including:**

- Manage the building plan review processes once assigned
- Perform plan review
- Confirm building use and identify safety requirements
- Check compliance with
- County codes
- Review/approve building/structural revisions
- Identify review costs
- Identify any building permit requirements
- Include any expedited plan review, if applicable

**HR Green will provide Permit Technician services including:**

- Provide remote permit processing, as directed
- Intake, review, and routing of private provider filings / documentation
- Support with permit completeness, fee formulation, certificate of occupancy issuance and related services

**HR Green will also provide Engineering Site Civil Plan Review services including:**

- Assign dedicated plan review staff
- Identify review requirements for each submittal received from the County
- Comply with County codes and Planning/Zoning requirements
- Detailed plan review for each discipline
- Coordinate with any conditions of approval
- Coordinate with the County on any questions
- Finalize correction and approval memo



TRANSPORTATION

Whether your infrastructure needs include design, construction, funding identification, innovative geometry, environmentally sensitive areas, sustainable and attractive structures, or difficult traffic challenges, we can provide the solutions you need.



WATER

From feasibility studies through construction phase services, we help clients achieve reliable, cost-effective, and innovative solutions for potable and process water, wastewater, and water resources management.



GOVERNMENTAL SERVICES

Our professionals combine creativity with reliability to provide staff augmentation and consulting services to local governments. We provide engineering, public works, planning, and building departments with staff to meet the variable workloads.



LAND DEVELOPMENT

We unify engineering, surveying, construction, land planning, and landscape architecture consultants into a single, integrated team that excels at project efficiency, effective project management and outstanding communication.



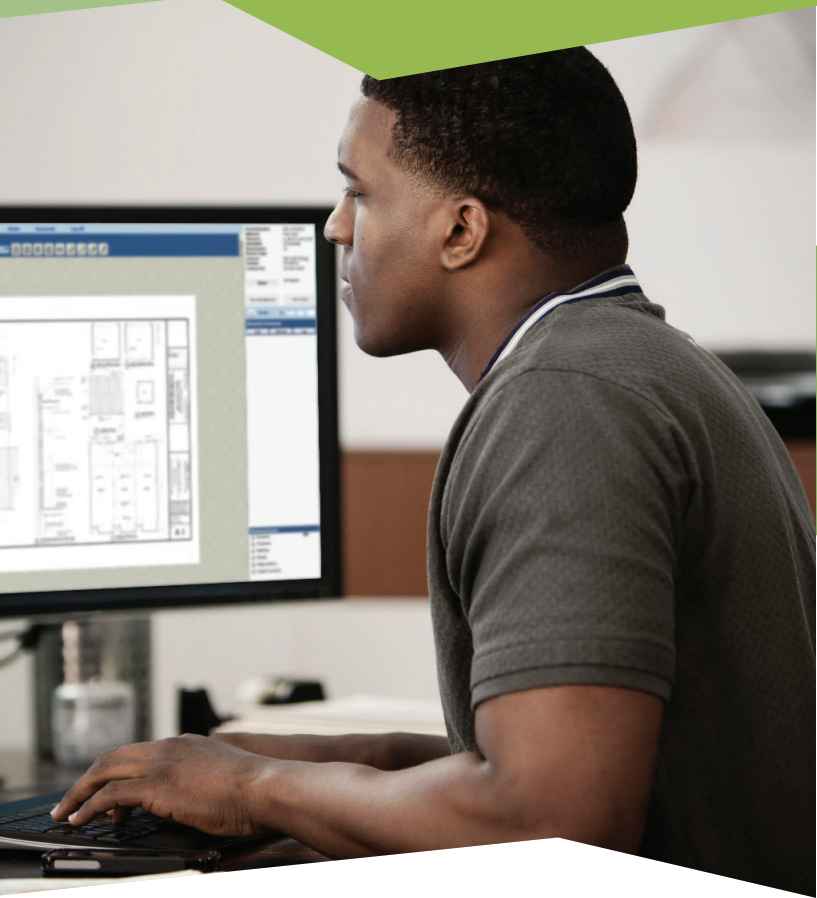
ENVIRONMENTAL

Whether your environmental needs include the remediation of brownfields sites to allow for community redevelopment, environmental compliance for infrastructure and facilities, or NEPA services for transportation infrastructure, HR Green can provide environmental solutions.



CONSTRUCTION

Our construction professionals are experienced with projects for municipal, county, and state clients that include bridges, roads and highways; storm and sanitary sewers; water distribution systems; water treatment facilities; wells, and storage facilities; pumps and lift stations; and wastewater facilities.



**A. Relevant Experience**

**+**

**D. References**



## Engineering Site Civil Plan Review + Facilitation Services

### *City of Denton, Texas*

**CHALLENGE:** Due to pressures of rapid growth north of the Dallas-Fort-Worth Metroplex into Denton and along the 35E Corridor, the Engineering Development Review Division of the Capital Projects Department is working to address its part in Denton’s long-running reputation of not being “business-friendly” among some builders, developers and businesses with reviewing private development construction plans as they pertain to and interact with the City of Denton’s public infrastructure (i.e., water, wastewater, drainage, streets, parks, etc.).

Throughout its history, the Engineering Review process has been cumbersome for both the development community and City staff. In 2018 the City was facing a high workload, extended staff working hours, and a backlog of 145 active development projects. With the increasing number of development projects submitted for review since 2008, staff resources had become extremely limited and had little time to focus on critical process improvements. The City desired to engage a consultant to:

- ▶ Evaluate current and recommend new/best practices and processes relating to engineering review
- ▶ Clear the backlog of existing development cases
- ▶ Provide offsite review efforts for the City
- ▶ Evaluate current review fees and recommend new fees

**SOLUTION:** Upon notice to proceed, HR Green mobilized a team of development review and municipal management professionals. This team met with city staff, department representatives, and the development community to engage in an operational and organizational assessment, provide recommendations, and establish optimal processes and fee structures that would allow a rapid transition from a reactive to proactive engineering review and processing model.

### REFERENCE

Scott McDonald  
Director of Development Services

City of Denton  
601 East Hickory Street  
Denton, TX 76205  
806.220.9976  
[scott.mcdonald@cityofdenton.com](mailto:scott.mcdonald@cityofdenton.com)





Simultaneously, we initially assigned an on-site Development Engineering Facilitator to streamline coordination with developers and oversee our team of experienced plan checkers (both on- and off-site) using a paperless processing and electronic plan review platform. Our staff members have helped roll out a developer escrow account fee structure to convert plan review into an enterprise model. We also developed executive-level reports that offer department heads and City Council the ability to track performance metrics and development activity trends.

Currently, we assign both full-time on-site and remote Development Engineering Facilitators as well as continuing to utilize electronic plan review and off-site plan review staff to accelerate reviews and approvals. In September, 2019 State House Bill 3167 required cities to speed up the site plan/subdivision plat approval process, and to provide more information when a plan or plat is not approved. HR Green staff has helped make changes to Denton's subdivision ordinance, zoning ordinance, and/or unified development code approval processes and incorporated best practices to meet this accelerated legislative approval timeline.

From a utilities perspective, HR Green has reviewed plans associated with water and sewer mains on existing and proposed streets as well as lift stations. Lift stations we have reviewed support the 455 single family Stark Farms Development, proposed for the 109-acre sewer shed. This has involved 1,700 feet of 6" diameter PVC force main and a 450-gpm duplex pump station with submersible pumps. The other major project is the 270 single family Townsend Green Development that has involved 5,440 feet of 6-inch diameter PVC force main and a 282-gpm duplex pump station with submersible pumps.

**BENEFIT:** HR Green's commitment to this contract has resulted in several tangible results including the resolution of nearly 170 backlogged cases that were tracked in Denton's case log within six months. HR Green has helped with the fast pass process, facilitated pre-application conferences, coordinated plan approvals between various City departments and staff, and verified City's long-range street improvement plans with developments.

Additionally, there has been improved communication and proactive interactions with the development community which helps the City Manager, Engineering Director, and City Council confidently plan for the future.



## Building Permit Plan Review, Permit Processing + Inspection Services

### Village of Oak Park, Illinois

**CHALLENGE:** The Village of Oak Park issued an RFP in 2015 seeking a consultant to provide both inspection services and permit plan review services for the Village’s Development Customer Services Department’s Permit Processing Division. At that time, the Village performed all building inspection services in-house with the limited resources of Village-employed inspectors. With an annual workload of thousands of inspections and plan reviews, the backlog of projects became overwhelming. HR Green was selected to take on the challenging task of assisting in working with Village staff to provide process structure enhancements and improve customer service levels. Upon completion and presentation of the Roadway Evaluation Report and associated maps, the Village asked the HR Green Team to build off the Roadway Evaluation Report and create a comprehensive 10-Year Recommended Maintenance Plan incorporating all of the Village streets. HR Green utilized various maintenance and rehabilitation techniques, and the understanding that the smaller Village does not have the luxury of large MFT fund allotments, to include every street in the 10-Year Roadway Maintenance Plan.

**SOLUTION:** Since 2015, HR Green has leveraged a multi-faceted staff to complete technical plan reviews and inspections on high-rise, large scale and mid-rise commercial and residential projects, including zoning, civil, structural, architectural, mechanical, electrical, plumbing, health, energy, and accessibility/ADA. HR Green has verified that drawings and specifications comply with adopted building codes, local municipal codes and ordinances, Historical District requirements (such as the nationally known Frank Lloyd Wright Registered District), and all third-party reports. In addition to performing daily plan reviews and inspections at the Village (8,000+ permits annually), HR Green is also under contract to perform large-scale plan reviews for various high-rise and multistory projects. These large-scale plan review projects requiring special professional reviews are performed by our ICC certified staff and our licensed professional staff, including structural engineers; architects, and mechanical, electrical and IDPH plumbing professionals.

**BENEFIT:** Utilizing a hybrid Village personnel and HR Green scalable staffing model while leveraging electronic plan review and automated permitting system, the Village’s backlog of permits was quickly eliminated following notice to proceed commencing in 2015. A one stop shop solution was achieved to meet a wide variety of client needs (from design development planning in collaboration with design professionals to efficiently meet code compliance requirements to occupancy of simple improvements to Frank Lloyd Wright historical projects alterations to complex high rise buildings); and customer service was enhanced through community code training/education workshops, implementation of best practice processes, thorough and timely reviews, and close communication.

### REFERENCE

Steve Cutaia  
Chief Building Official/ADA  
Coordinator

Village of Oak Park  
123 Madison Street  
Oak Park, IL 60302  
708.358.5420  
scutaia@oak-park.us

“I have always been very, very impressed with your work as third-party reviewers in the Village of Oak Park. I also have had the opportunity to attend your seminar on the code changes and their implications – very enlightening. You are always very cooperative in your reviews and your quick turn arounds.”

Barkat Virani, Design Consultant





## Community Development Review + Permit Processing Services

### *El Paso County, Colorado*

**CHALLENGE:** Like many cities and counties in Colorado, El Paso County is experiencing rapid growth. A few key staff members have left the County, which left the County with a backlog of electronic planning and zoning submittals. The areas of need/assistance are:

- ▶ Administrative Relief
- ▶ Co-Location Agreements
- ▶ Site Development Plan Review
- ▶ Sign Permits
- ▶ Administrative Special Use
- ▶ Coordination with Applicants and Review Agencies
- ▶ Setup, Review, and Closeout of Projects
- ▶ Other Duties as Assigned by the Planning and Development Leadership Team

**SOLUTION:** The County offered HR Green the opportunity to provide a multi-disciplined team to perform complete technical Community Development Planning electronic (remote) reviews for the items mentioned above and HR Green and El Paso County entered into a one year contract for \$528,000. Within two weeks of authorization, the HR Green team was trained on EDARP (the County's electronic plan submittal software) and was part of the intake/distribution and review process to keep the applicants happy. HR Green met the required turnaround times and has taken one more responsibility and electronic plan checks to assist all departments. The HR Green team has fit in behind the scenes seamlessly and has been part of the success since June 2022.

**BENEFIT:** HR Green's scalable on-demand solutions provided the El Paso County Community Development Department the required experience and technical support to manage the deadlines over the last three months. The County also sees the value-added benefit of having all the experience of the HR Green team as other challenges and peak demands arise.

### REFERENCE

Kevin Mastin  
Executive Director

El Paso County  
2880 International Circle, Suite 110  
Colorado Springs, CO 80910  
719.520.6300  
kevinmastin@elpasoco.com



## Building Permit Plan Review + Engineering Site Civil Plan Review Services

*City of Palm Desert, California*

**CHALLENGE:** The City of Palm Desert is centrally located in the heart of the Coachella Valley in southeastern Riverside County. Known as the cultural and retail center of the desert communities, it has approximately 21 square miles with a population of 52,500, and a small in-house municipal staff. As a forward-thinking community, the City wished to implement some key initiatives and needed consultant assistance to achieve these program and project objectives.

**SOLUTION:** Following a competitive procurement process to identify a consultant with the ability to deliver a breadth of services, HR Green was contracted to deliver a full range of consulting services, including building and civil plan check, a land development engineer, as well as construction management and inspection services for public works. Our services are provided both on-site and remotely. In 2021, the City issued permits for \$200 million of construction valuation. The City completed 1,060 new single family homes and 192,000 square feet of commercial space was approved. In 2022, a major 18-acre development project at Desert Willow Golf Resort, just south of the existing Desert Willow Clubhouse, was approved by our HR Green Team for plan review. The development project includes a 5.5-acre surf lagoon and wave machine, surf center and associated facilities, 92 room hotel, and 83 for-sale residential units and clubhouse. Also in 2022, HR Green reviewed a 269 unit multifamily affordable housing community project for the City. We have successfully collaborated with designers, contractors, and other City departments to streamline the path to plan approval, saving the City and developers time and money through an efficient and effective process.

Other plan checks for the City include residential custom homes and duplexes, commercial tenant improvements, museum buildings and large solar reviews. All reviews are 100% electronic with a 100% success rate meeting plan review schedules. Our key to success with applicants and stakeholders has been through the use of electronic technology to streamline reviews, working cohesively with the City officials, and taking a proactive approach to problem solving for a timely turnaround to plan review.

**BENEFIT:** HR Green's commitment has allowed us to meet the City's performance objectives for their core service needs while accelerating new initiatives, such as updating the City's design standards and creating a broadband feasibility study and master plan.

### REFERENCE

Jason Finley  
Chief Building Official

City of Palm Desert  
73-510 Fred Waring Dr.  
Palm Desert, CA 92260  
760.776.6420  
jfinley@cityofpalmdesert.org

Todd Hileman  
City Manager

City of Palm Desert  
73-510 Fred Waring Dr.  
Palm Desert, CA 92260  
760.346.0611  
thileman@cityofpalmdesert.org

*“The [building plan check] turnaround time of you guys is incredible.”*

Applicant Alex Sosa  
Shoe City Tenant Improvements  
(El Paseo Plan Review Comments)

*“I thank you and your team so much for making the plan check reviewing process so smooth.”*

Applicant Kathy Amaya  
Assistant Project Manager  
Permit Advisors



**Building & Development Review (BDRS) On-Call Services, 23-0482-RFP**

▷ Pinellas County



## Building Permit Plan Review, Engineering Site Civil Plan Review + Permit Processing Services

*City of Jurupa Valley, California*

**CHALLENGE:** The City of Jurupa Valley incorporated in 2011. After a successful election early in the year to both incorporate as a city and to elect the new city leadership (City Council), they were faced with the need to deliver full city services on July 1, 2011 to the community. The determination was made to solicit proposals from qualified firms to establish the new organization and deliver a full range of city services on an interim basis until the city could get established.

**SOLUTION:** In April of 2011, the City selected HR Green to establish the new organization. The City appointed their City Manager, City Attorney, City Clerk and Finance Director. From 2011 to 2020, HR Green provided a full range of city services including administration, city engineering, design, public works management, building and code, CIP management and special services. The City has been evolving and several services have been brought in-house to full time staff. However, the City continues to rely on HR Green to provide key support with on-site staffing and remote services.

Our staff delivers all civil plan review and building and safety plan review services. In addition, we provide as needed building inspection, public works inspection and permit technician support. HR Green was instrumental in helping the City's Building Department to be awarded the **2021 CALBO Building Department of the Year award.**

Our civil engineers review and approve site development plans, grading, drainage, utility, water quality and related items. Our building team reviews and approves structural, non-structural, energy, green, mechanical, electrical, and plumbing plans. Accessibility-certified staff reviewed facility plans and specifications for compliance with State and Federal accessibility laws, codes, and regulations; investigated facilities for compliance with State and Federal accessibility codes and regulations; and conducted accessibility research for reports and handling accessibility inspections.

### REFERENCE

Rod Butler  
City Manager

City of Jurupa Valley  
8930 Limonite Avenue  
Jurupa Valley, CA 92509  
951.332.6464  
rbutler@jurupavalley.org

"I have had the pleasure of working (currently) with 20 HR Green employees in my department. These HR Green staff members perform plan check, building inspections, permit issuance, management/supervision, and code enforcement duties. This staff is highly qualified in terms of education, certification and experience, which results in a high level of customer service productivity. Furthermore, I would highly recommend HR Green to any city or agency that needs their services."

Keith Clarke  
Former Chief Building Official/  
Director

"The City of Jurupa Valley continues to be very pleased with the services that we are receiving from HR Green. In an active and fast-growing city like Jurupa Valley, being able to supplement our internal team with well-managed contract staff makes us all the more effective in serving our residents and the development community."

Rod Butler  
City Manager



**Building & Development Review (BDRS) On-Call Services, 23-0482-RFP**

► Pinellas County



**Deploying Accela**, we have achieved a 98% success rate meeting plan review schedules. Annually, this involves 2,100+ improvement plan sheets being reviewed, 2,200+ building plan reviews completed annually, and 150+ new planning projects reviewed. We have processed grading plans, improvement plans, architectural plans and maps for 2,000+ new residential units. Our staff have customized plan check checklists, leveraged electronic plan check, digital commenting, and mobile apps for web-based field inspections in real time; established development review processes; and consistently hold developer workshops and pre-planning meetings to facilitate entitlement process. Moreover, we provide as needed permit counter staffing (issue >60% of permits over the counter), proved inspection support to accomplish 15,000+ building inspections annually (100% completed on-time); technician support as needed to issue 1,500+ building permits annually.

**BENEFIT:** HR Green's efforts have reduced plan processing and inspection costs. Because the majority of the work is done remotely and electronically, there is a significant savings of both time and money. The estimate is an estimated 20 – 35% due to shorter turnaround times and lower costs to the City. Developers have appreciated the accuracy of plan review comments and improved turnaround times that save both time and money. HR Green typically provides developers with estimated hours to complete plan reviews in advance of initiating work and estimated costs. HR Green staff works within these budgets – unless the scope of work changes.



## Building and Safety + Engineering Site Civil Plan Review Services

### *City of Palos Verdes Estates, California*

**CHALLENGE:** The City of Palos Verdes Estates recognized that they needed to improve their level and quality of services to the community. Because Palos Verdes Estates is in a semi-isolated portion of Los Angeles County, it was realized that there may be some difficulty in the breadth of services that could be provided by private providers. The goal was to assure that the proper dedication of staff and level of response could be provided by the selected contract provider. In 2015, they solicited proposals to seek a provider of city engineering and building and safety services.

**SOLUTION:** Following extensive interviews, HR Green was identified as the preferred provider. Following negotiations with the City, HR Green was contracted to deliver full city engineering and building and safety services. Since 2015 HR Green has provided a full range of consulting services. This includes but is not limited to comprehensive building and safety services including: building official, building inspection and building plan review. HR Green also provides city engineering, civil site review, design, public works engineering, transportation planning, traffic engineering, CIP program management, grant writing/administration, and project management. Our staff members consistently meet or beat plan review turnaround schedules, provide over-the-counter and electronic plan review, and achieve a 100% success rate on building and safety inspections within two-hour windows. Last year our staff successfully completed over 1,233 plan checks for the City. HR Green provides a “one stop shop” to achieve excellent customer satisfaction and implemented a building permitting and community development system (SmartGov) which the City now owns and operates. Our services are provided both on-site and remotely. Our staff interfaces closely with the City’s permit technicians and has initiated best practices (e.g., new forms, tracking tools, electronic plan review, code updates, ADA transition plan, etc.). HR Green is the Building Department in the City, providing the Building Official on-site two half days per week and is available for questions from staff and the public at other times. We have our plan review manager on site for most of the week, giving the City access to the most technically up-to-date code information in the industry. We provide all manner of building and safety inspections, including custom homes, commercial, tenant improvements, and grading.

**BENEFIT:** HR Green’s commitment has resulted not only in an increased level of service but also in significant community benefit. For contractors and developers, it has resulted in improved turnaround times and cost savings. The end result quality of services and product has been clearly recognized. For the residents, there has been significant improvement in satisfaction of services delivered and response to community needs. The City has also realized cost savings due to the improved response and efficiency of services provided to the community.

### REFERENCE

Mark Prestwich  
Former City Manager  
City of Palos Verdes Estates (now  
City Manager at Hemet)

951.765.2430 or 951.765.2300  
mprestwich@hemetca.gov

*“I’ve worked with the HR Green Building & Safety staff for over 2 years and continue to be impressed by their professionalism, expertise, and genuine best interest for the city. From public inquiries to final inspection and the entire building process in between, the staff’s unwavering commitment to compliance, deadlines, and relationships is appreciated.”*

Brianna Rindge, AICP  
Former Community Development  
Director  
City of Palos Verdes Estates  
(now at City of Lomita)



## Building Permit Plan Review Services

### *City of Auburn, Alabama*

**CHALLENGE:** The City of Auburn (population approximately 78,000) was challenged to meet their demands for complex Building & Code Plan Check services, primarily for buildings for Auburn University, the second-largest university in the state, averaging more than 26,000 enrolled students every semester, and the City's primary employer (approximately 10,000). Additional City challenges included a significant backlog of projects that was continually growing due to their lack of staff; simple plan check projects were taking up to two months to complete. Because of the complexity of these multi-story large-scale projects it required significant redesign of buildings for them to be code compliant for the University. Our involvement is assisting in solving these code design issues during our plan review process. This has allowed the building inspectors to reference the approved plans versus identifying the issues in the field, resulting in a significant cost savings to the University and developer.

**SOLUTION:** We assigned a highly qualified and industry respected Master Code Professional along with one of our Licensed Architects, to work with the City in a remote capacity. They brought more than 35 years of comprehensive building plan check and design experience and began to assist the City in reducing their backlog of complex projects and creating new solutions to existing building and code problems. In one such instance, our staff discovered that a mixed-use (lower level), multi-story student-housing (upper levels) project had been inadequately designed for the University. The initial design was so large that it would take up an entire city block. Due to the City's fire code restrictions, our plan checker discovered the building would need to be redesigned as if they were five separate buildings. Our extensive experience with fire codes quickly brought both the problem and solution to the City's attention. In addition, we developed procedures for the City's Development Services Building Department, including the creation of plan review checklists for different types of specific projects. This would allow for the streamlining of the plan review process, providing faster turnaround times to customers, and allowing City staff to become proactive, rather than reactive to Building and Code issues. Our staff also worked with local developers to strengthen relationships between City staff and developers, helping developers to better understand the City's needs early in the design and development process

**BENEFIT:** The City is very pleased with HR Green's ability to provide experienced Building & Code staff. HR Green has become a "one-stop shop" for the City's needs. The City has assigned some of the larger and more complex plan review projects to HR Green, thereby alleviating the workload of their in-house City staff. Projects that were taking months to complete through the plan review and approval process, are now taking approximately one week. HR Green has become the only outside contractor for Building & Code services to the City.

### REFERENCE

John Hoar  
Building Official/Inspection  
Services Director

City of Auburn  
171 North Ross, Suite 300  
Auburn, Alabama 36830  
334.501.3176  
jhoar@auburnalabama.org

*"The staff of HR Green provided a thorough and efficient review of several multifamily projects for us. Their attention to detail allowed the projects to proceed with minimal issues for all parties involved."*

John Hoar, Building Official/  
Inspection Services Director,  
City of Auburn





## Engineering Site Civil Plan Review Services

### *City of Aurora, Colorado*

**CHALLENGE:** The City of Aurora is located in three counties. Having the most developable land in the Denver metro area, the City is undergoing considerable growth in their commercial and industrial base as well as adding several residential communities. Their staff and the consultant reviewers could not keep pace with the documents requiring plan review (civil plans, preliminary and final drainage reports and plans, and stormwater management plans), resulting in missed deadlines and multiple resubmittals.

Additionally, the City has developed a backlog of capital projects that they have been unable to get started after the COVID pandemic in part due to a lack of staffing.

**SOLUTION:** The City offered HR Green the opportunity to assist with a \$350K plan review contract. Within five months of starting, by leveraging staff from multiple offices, HR Green has met the required turn around times 98% of the time, and we have added review assistance for site plans, small cell sites, fiber installations, and CLOMR/LOMRs.

**BENEFIT:** Two bridge design projects were able to get started much earlier because of HR Green's input and assistance. In addition, HR Green is actively working with the City to clarify the street lighting standards. Our services have resulted in additional extensions of \$1.5 million to the contract as we continue to provide value-added services to the City.

### REFERENCE

Haley B. Johansen  
City Engineer

City of Aurora  
15151 E. Alameda Parkway  
Aurora, CO 80012  
303.739.7300  
hjohanse@auroragov.org



## **B. Team Organization**

# B. Team Organization

Your primary point of contact is **Frank Urbina, NCARB, AIA, ALA, APA**, our assigned **Project / Contract Manager**, who will be the County's primary contact and will see that all resources are allocated to your projects as needed. **Rick White, PE**, HR Green's President of Governmental Services and a **Registered Professional Engineer in Florida**, will verify that our proven quality control processes are consistently followed. Each of our core service categories (**Building Permit Plan Review, Permit Technician Services, and Engineering Site Civil Plan Review**) will be managed by industry-recognized thought leaders/practitioners. Each task leader will manage a team of highly qualified in-house staff members for their respective services areas. Their resumes are included on the following pages.



## Building & Development Review Services



**Quality Assurance / Quality Control Director**  
Rick White, PE ■



**Client Services Manager**  
Russ Loebe, ICMA-CM ■



**Technical Advisor Engineering Plan Review**  
Tim Hartnett ■



**Technical Advisor Building Plan Review + Permitting**  
George Wentz, PE ■



**Project/Contract Manager**  
Frank Urbina, NCARB, AIA, ALA, APA ■

## Building & Development Review Services Team



**ENGINEERING SITE CIVIL PLAN REVIEW**  
Tina York, PE - Task Lead

- Derek Wieske, PE ■
- Marla Doyle, PE
- James Xiong, PE
- Derrick Mills, PE, CFM
- Miranda Martin
- Katie Snyder
- Angela Saxton, QSD/QSP, CESSWI, CISEC
- Ken Price, CGCIO, CCM (Fiber and Broadband)



**BUILDING PERMIT PLAN REVIEW**  
Carlos Yado, CBO - Task Lead

- Beth Jay, ICC/OES-Certified ■
- Sandra Schmitz, PE, ICC-Certified ■
- Ken Welch, CFPE, CFM, MCP, CBO ■
- Roger "Rick" Molina, MCP, CBO ■
- Desiree Flores, PE
- Steve Schwarz, PE, SE
- James Errico, Fire & Life Safety



**PERMIT TECHNICIAN SERVICES**  
Linda Nguyen - Task Lead

- Rob Stauffacher, ICC-Certified
- Tina Williams, ICC-Certified
- Kim Evans
- Berlyn Castaneda

### Legend

■ Key Personnel





## C. Depth of Staffing

# C. Depth of Staffing

Below please find a matrix of proposal staff and their capabilities.

	Years of Experience	CAPABILITIES																													
		PLAN REVIEW														VALUE-ADD SERVICES															
PROPOSED STAFF	Electronic Review / Permitting	Accela Proficiency	Building	Mechanical	Electrical	Plumbing	Structural (conventional)	Structural (engineering)	Disabled Accessibility	Fire-Building	Green and/or Energy Code	Solar / Photovoltaic	Green and/or Energy Code	Grading + Civil	Erosion Control / Stormwater / WMPS / SUSMP	Floodplain Management	Subdivision Plats	Roadway / Transportation	Right-of-Use Permits	Permit Processing	Permit Applicant Meetings / Conferences	Building Inspection	Solar / Photovoltaic Inspection	Erosion/Stormwater Best Management Practices (BMPs)	Code Enforcement	Building Department/Code Training	Telecom / Fiber / Wireless Facilities Application Review	Electronic Plan Review	Electronic Permitting	Remote Staffing / Communication	
Frank Urbina, NCARB, AIA, ALA, APA	32	■	●	●	●	●	●			●		●	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	
Rick White, PE	32													●	●	●	●	●	●	●	●	●								●	
Tim Hartnett	35	■												●	●	●	●	●	●	●	●	●			●				●	●	●
Russ Loebe, ICMA-CM	45																●	●	●	●	●	●								●	
George Wentz, PE	52	■	■	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Tina York, PE	37	■	■									●	●	●	●	●	●	●	●	●	●	●			●	●	●	●	●	●	●
Derek Wieske, PE	33	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
Marla Doyle, PE	42	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
James Xiong, PE	35	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
Derrick Mills, PE, CFM	9	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
Miranda Martin	15	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
Katie Snyder	11	■	■											●	●	●	●	●	●	●	●	●			●			●	●	●	●
Angela Saxton, QSD/QSP, CESSWI, CISEC	24	■	■												●					●	●	●			●			●	●	●	●
Ken Price, CGCIO, CCM	38	■	■																	●	●	●					●	●	●	●	●
Carlos Yado, CBO	20	■	■	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Beth Jay, ICC/OES-Certified	17	■	■	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Sandra Schmitz, PE, ICC-Certified	39	■	■	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Ken Welch, CFPE, MCP, CFM, CPO	37	■		●	●	●	●	●	●	●	●	●	●							●	●	●	●	●	●	●	●	●	●	●	●
Roger "Rick" Molina, CBO, MCO	20	■		●	●	●	●	●	●	●	●	●	●							●	●	●	●	●	●	●	●	●	●	●	●
Desiree Flores, PE	8	■	■	●	●	●	●	●		●	●	●	●	●	●			●	●	●	●	●			●			●	●	●	●
Steve Schwarz, PE, SE	37	■					●	●						●							●	●						●	●	●	●
James Errico	16	■		●						●	●	●								●	●	●	●	●	●	●	●	●	●	●	●
Linda Nguyen	19	■	■	●								●	●								●	●		●				●	●	●	●
Kim Evans	24	■	■																	●	●	●						●	●	●	●
Rob Stauffacher, ICC-Certified	4	■	■	●								●								●	●	●	●	●	●	●	●	●	●	●	●
Tina Williams, ICC-Certified	30	■		●																●	●	●						●	●	●	●
Berlyn Castaneda	7	■	■																	●	●	●						●	●	●	●



## C. Depth of Staffing



### Frank Urbina, NCARB, AIA, ALA, APA

#### Project Manager

Frank has 32 years of experience as a Licensed Architect, Project Manager, Building Inspector and Building Commissioner in the private and public sectors of Architecture, Construction and Municipal Government. He is currently the Chief Building Official to HR Green's Building and Code Governmental Services Business Line serving municipal agencies and school districts. **Frank has managed a wide variety of building services and their processes including electronic plan reviews, virtual inspections, automated permitting, construction inspections and code enforcement, deploying the latest codes, and assessing the appropriateness of fee schedules.** He has also coordinated property conditions assessments to budget and prioritize agencies' capital improvement and maintenance projects and programs.

He previously managed his own architecture firm including the management of multiple construction trades, simultaneously overseeing their scope of work as well as management of municipal staff servicing the public. Frank understands department process efficiency relationships pertaining to meeting budgets, revenues and expenses and the importance of servicing the public.

He has a proven track record of evaluating a Building Department, improving its performance processes and implementing a proactive educational approach to code enforcement. Frank has been the lead Project Manager for plan reviews and inspections, and has helped streamline workloads and eliminate the backlogs of projects that overwhelm staff. Frank is instrumental in including staff on decisions to make processes more efficient.

#### SELECTED PROJECT EXPERIENCE

##### ► Building Department Administration, Plan Review, Permit Processing, Code Enforcement, and Inspection, Public Agencies Nationwide

Chief Building Official and Project Manager for the administration of Building, Zoning, and Code Enforcement Departments from permitting, plan review, inspection, and code compliance through issuing certificates of occupancy. He has a proven track record of evaluating a Building Department, improving its performance processes and implementing a proactive educational approach to code enforcement. **Many of his clients have required accelerated and 100% electronic plan check, including the processing of complex high-rise structures in urban environments.** He has served 20+ agencies throughout the country, including agencies in Alabama, Illinois, and Missouri, and collaborated with other HR Green staff in the provision of civil plan review services.

#### EXPERIENCE

32 Years

#### EDUCATION

MA, Architecture

BA, History of Art

#### REGISTRATION / LICENSE

National Council of Architectural Registration Boards, #73791

Registered Architect, IL #001-017121

#### PROFESSIONAL AFFILIATIONS

American Institute of Architects

Association of Licensed Architects

American Planning Association

FEMA Certificate in Advanced Stormwater Floodplain Management

"On the recent high-rise project that our firm constructed in Oak Park, HR Green ([under Frank Urbina's leadership] made the inspection process run as smooth as I have experienced in my career. Their **professional, technically proficient staff** collaborated with us and **communicated in a thorough and insightful manner** to develop an effective plan so as not to impact the flow of work and schedule. Any construction matters were resolved fairly and quickly. I look forward to working with them again on my next project." - **Rich Goodwin | Project Manager, Clark Construction**

## C. Depth of Staffing



### Rick White, PE

#### Quality Assurance / Quality Control Manager

**A registered Professional Engineer in Florida**, Rick serves as the Governmental Services Business Line President and Board member, Rick has responsibility for effectively delivering high-quality services to all of HR Green's clients. These duties include project staffing, growth and development of new company-wide services improvement of project delivery models, and most importantly, client satisfaction. Rick has also served as a Project Manager or technical resource on some of HR Green's most challenging projects. His experience includes infrastructure design for cities, counties, State Departments of Transportation, U.S. Army Corps of Engineers, and various international projects.

Under his leadership, HR Green staff have provided comprehensive building and development review, permitting, code compliance, fiber and broadband, small cell/5G, smart city, staff augmentation, project/program management, multi-faceted engineering, drainage, water quality compliance, organizational/operation audit, municipal management, construction management, inspection, and asset management services.

**His staff members have provided full service building and development review services to 75+ agencies around the U.S. (building plan review, site civil engineering review, code compliance, inspection, and permit processing).**

**Rick is a registered professional engineer in 11 states.**

#### EXPERIENCE

32 Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION (partial list)

Professional Engineer, FL  
#71849

Professional Engineer, TX  
#135038

Professional Engineer, AL  
#31548-E



### Timothy Hartnett

#### Technical Advisor - Engineering Site Civil Plan Review

Tim leads the Governmental Services Engineering + Building & Code Practices and is a Vice President and Principal of the firm. For the past 35 years, Tim has provided ongoing municipal engineering and development review services to municipalities and counties, guiding them through periods of extreme growth. **He has provided subdivision and site improvement review/approval process from concept plan through the final plat in accordance with applicable codes, engineering standards, development agreements, and annexation agreements.** Tim supports strategic decision-making by presenting information to boards and committees, facilitating public engagement discussions, meeting with developers, and informing residents and business owners of project schedules.

Tim has considerable experience performing critical services such as grants and funding procurement for roadway, parks and facility improvements, construction observation, general engineering advisory services, water and wastewater master planning, capital involvement planning and implementation, grant programs and staff augmentation and support. Tim also acts as the lead contact between HR Green clients and the various design/field staff members executing all projects within the communities he represents.

#### EXPERIENCE

35 Years

#### EDUCATION

BS, Engineering Design

#### AFFILIATIONS

American Public Works Association (APWA)

American Council of Engineering Companies (ACEC)



## C. Depth of Staffing



### George Wentz, PE

#### Technical Advisor - Building Plan Review + Permitting

George serves as Vice President of HR Green's Governmental Services Business Line, which offers a comprehensive suite of services to help local agencies function more effectively and efficiently. He brings more than 50 years of administrative, management, and local government related experience, focused on delivering consulting support to public agencies. He has served as City Manager, Assistant City Manager, **Public Works Director, City Engineer, Building Official, Planning Director**, Traffic Engineer and Economic Development Manager.

George has directed and administered projects which range from on-call support to full city contract services. His responsibilities have ranged from accountability for day-to-day completion of activities associated with a contract to Principal-in-Charge of particular projects. His managerial experience and high level of success is well documented and recognized by the agencies he has served. He is recognized in the field as having a unique talent in working well with City Councils, boards, commissions, committees, ad-hoc groups, managers and staff to achieve desired agency results. **He has focused on the master planning and implementation of high-profile, revenue-producing developments, golf courses, and mixed-use resort communities. Moreover, he has served as a development manager**, responsible for identifying specialty designers, contractors, and operators; preparing and maintaining documentation; incorporating applicable procedures and standards into design and construction documentation; coordinating closely with agency, developer, city departmental staff, approving agency, and community stakeholders; facilitating community outreach; and coordinating project management, estimating, constructability, and scheduling efforts.

#### EXPERIENCE

50+ Years

#### EDUCATION

Master, Public Administration

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer, CA #43273

Professional Engineer, CO #0018808

Professional Engineer, AZ #21154



### Russ Loebe, ICMA-CM

#### Client Services Manager

Russ Loebe, an ICMA Credentialed City Manager, is Vice President of Governmental Services for HR Green. Before joining HR Green in 2011, Russ spent 33 years in local government working for the Village of New Lenox, Illinois. During his career with New Lenox, he served for 25 years as the Village Administrator and 8 years as the Director of Public Works. As Administrator in one of the fastest growing communities in the Chicago metro area (5-fold population increase in 30 years), Russ has been responsible for the management of all aspects of municipal government, managing dozens of major capital projects, award winning budgets and CAFRs, labor contracts and scores of residential, commercial and industrial development projects. Russ was instrumental in designing and creating the legal framework and organizational structure for a multi-governmental health insurance pool in 1989.

Since joining HR Green, Russ has led numerous projects and studies for local government including organizational and staffing studies, utility rate analysis, and general management consultation.

He supports various strategic initiatives and public agencies throughout the country so that HR Green services are of high quality and responsive to our clients' needs.

#### EXPERIENCE

40+ Years

#### EDUCATION

BS, Environmental Technology

#### CERTIFICATION / LICENSE

ICMA – CM Credentialed City Manager

Licensed Illinois Class 1 Wastewater Treatment Operator





## C. Depth of Staffing



### Tina York, PE

#### Engineering Site Civil Plan Review Task Leader

Tina is the Civil Plan Check director leading our national team and has 30+ years of experience focusing on civil plan review, project management, civil engineering, site grading and drainage design, and review of hydrology and hydraulics studies. She has also performed construction inspection for municipalities. Having overseen plan review services for 30+ agencies, she has customized plan review reports and tracking logs, checklists, and budgetary worksheets for tracking inspection costs. Tina has also managed a web-based plan check tracking system to give agency staff 24/7 project status and implemented electronic plan checking to enhance communication, reduce review times, and save money. She is proficient using various software applications, including **Accela, Digital Plan Room**, SMARTGov, NewForma, Bluebeam Revu, TRAKiT, SunGard, Adobe, e-PlanSoft, and ePermitHub. In addition, Tina has provided engineering plan review services for the U.S. Army at JBSA-Fort Sam Houston and Fort Hood, TX, Fort Bragg, NC, Fort Carson, CO, Fort Belvoir, VA, Fort Irwin, CA, and Fort Lexington, KY.

#### EXPERIENCE

30+ Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer,  
CA #46367

Professional Engineer, MI  
#6201037473

Professional Engineer, WA  
#46872

#### SELECTED PROJECT EXPERIENCE

##### ► Engineering Plan Review, County of Orange, CA

Project Manager for the planning, permit processing, map check and plan check review of various projects and backbone infrastructure associated with Planning Areas 1 and 2 of the Ranch Plan, a 23,000-acre development (6,000 buildable acres) as well as a Newport Coast development tied to the Crystal Cove Master Plan. All work was processed electronically through the County's automated permitting system and all reviews were done through digital commenting under an expedited 5/3/1 turnaround review schedule.

##### ► Engineering Plan Review, County of San Diego, CA

Project Manager overseeing plan review engineers for checking parcel maps, tract maps, and record-of-survey maps. Reviewed closure calculations for accuracy and conformance with right-of-way documents and final maps, legal descriptions of dedications and easements, statements for conformance to Map Act and County requirements, title reports to ensure accuracy and conformance to right-of-way documents, and that easements or restrictions were accurately portrayed on the right-of-way documents; prepared Private Road Maintenance Agreements and Declaration of Covenants; reviewed and revised legal descriptions for public dedications; prepared legal descriptions and plats; and reviewed final maps.

##### ► Engineering Plan Review, City of Aurora, CO

Plan Review Manager for the grading plans, improvement plans, and hydrology/hydraulic studies on an as-needed basis. Plans ranged from minor to major residential subdivisions and commercial/industrial sites. Tracked projects from first submittal to agency acceptance via web-based system and uses electronic plan reviewing. The City developed a backlog of review projects that they have been unable to get started. Within five months of starting, HR Green alleviated the backlog by leveraging staff from multiple offices, Tina and her team have met the required turn around times 98% of the time, and added review assistance for site plans, small cell sites, fiber installation, and CLOMR/LOMRs. Additionally, two bridge design projects were able to get started much earlier because of Tina's input and assistance. Also, HR Green is actively working with the City to clarify street lighting standards.

##### ► Engineering Plan Review, City of Denton, TX

Plan Review Manager for the remote plan review of all site civil plans involving electronic review/digital commenting to meet State accelerated legislative approval timelines.

## C. Depth of Staffing



### Derek Wieske, PE

#### Engineering Site Civil Plan Reviewer

Derek has 30+ years of professional experience, primarily in public works, land development, and transportation projects, as well as design, project management, and construction management. Derek has served as a city engineer and public works official managing **complex and coastal-oriented projects**. He brings expertise in the **implementation of low impact development best management practices** during construction, including bioswales, porous pavement, and retention basins. Derek has reviewed and approved hundreds of these features, and has lectured in the past at a Healthy Watersheds seminar on some of his project success stories. As the Acting City Engineer for the City of Long Beach from 2012 to 2016, Derek managed and led the Design Division of City's Engineering Bureau for a city with nearly 500,000 population, where he was responsible for efficient delivery of wide variety of capital programs, including roads, **tidelands/marine projects**, bridge improvements, drainage systems, "complete streets" projects, building improvements, utility undergrounding, park improvements, traffic signal system improvements, and bicycle improvement projects. He also **oversaw the City's private development review function of public works department, where he worked closely with City's Planning Bureau. In this capacity, Derek oversaw several in-house and consultant plan check engineers on a wide variety of residential, commercial, and industrial projects.** Derek also served as the Acting City Engineer for the City of Fullerton, where he was **responsible for the Engineering Division and Development Services Section, drafted conditions of approval, and managed the Engineering Plan Check Program.**

#### EXPERIENCE

30+ Years

#### EDUCATION

MS, Civil Engineering

Master, Business Administration

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer, CA #49872



### Marla Doyle, PE

#### Engineering Site Civil Plan Reviewer

Marla has more than 40 years of public works administration, city engineering, civil engineering, infrastructure design, water quality, and construction management experience throughout California. Her expertise involves **plan review; land development; defining, programming, and managing municipal CIP projects; land development; water quality; pavement and asset management; design; and construction management.** This experience includes road, bridge, water, open space, trail, grade separation, water quality, drainage, building, traffic, coastal, and utility projects. She has also been involved with development processing of projects and **extensively using electronic plan review systems.**

**She has extensive coastal experience, including serving as a Deputy Public Works Director/City Engineer and Senior Engineer for various coastal municipalities, responsible for managing and directing Engineering Division of the Public Works Department, including land development, inspection services, capital improvement project design and construction, pavement management, and asset management.**

Marla also served as **Public Works representative on all projects and issues relative to the Upper Newport Bay in California.**

#### EXPERIENCE

40+ Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer, CA #35086

## C. Depth of Staffing



### James Xiong, PE

#### Engineering Site Civil Plan Reviewer

James brings 30+ years of project management, design, plan review, hydrology, hydraulics, water quality, transportation engineering, office engineering, and construction management experience related to public works, infrastructure, drainage, rail facilities, bridge, highway, and utilities projects. He has handled **engineering site civil plan review for nearly 20 counties and cities using digital commenting, including Accela**. For nearly two years he served on-site as a Project Engineer at SANDAG for CIP projects and a few years at the County of San Diego and Jurupa Valley for plan check services. He also brings extensive transportation-related design engineering and project management experience in China.

#### EXPERIENCE

30+ Years

#### EDUCATION

MS, Transportation Engineering

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer, CA #67998

#### SELECTED PROJECT EXPERIENCE

- ▶ **Engineering Site Civil Plan Review, Riverside County Transportation Department, County of Orange, County of Imperial, and County of San Diego, CA**
- ▶ **Engineering Site Civil Plan Review, City of Denton, CO**
- ▶ **Engineering Site Civil Plan Review, Cities of Jurupa Valley, Corona, Moreno Valley, Upland, Hemet, Diamond Bar, La Quinta, Victorville, Palos Verdes Estates, Indio, Hesperia, Carlsbad, and Escondido, CA**
- ▶ **Engineering Site Civil Plan Review, Elsinore Valley Municipal Water District, CA**



### Derrick Mills, PE, CFM

#### Engineering Site Civil Plan Reviewer

Derrick brings eight years of progressive engineering experience, including **electronic plan review**; stormwater management and design; simple street design; water and sanitary utility system design; **SWMP plan design and review**; **plan completeness review**; **permit management**; city relations; state level project cooperation/coordination; **CLOMR and LOMR review**; preparation of an EPA-compliant Manual for Spill Prevention, Control, and Countermeasure (SPCC); and project management. He is proficient with HEC-HMS, HEC-RAS, EPASWMM, and StormCAD. Derrick is a U.S. Army veteran. As part of his military intelligence assignments, he worked with GIS software and GIS derivative software.

#### EXPERIENCE

8 Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION / CERTIFICATION

Professional Engineer, TX #139269

Certified Floodplain Manager #0490-21N

#### SELECTED PROJECT EXPERIENCE

- ▶ **Engineering and Floodplain Administration, City of Leander, TX.** Staff Engineer and Assistant Floodplain Administrator. Worked at establishing FEMA-advised regulations in relation to the Community Rating System (CRS), involved in establishing a Capital Improvement Program (CIP), critiquing and establishing project bid contracts and RFQ contracts, presenting code and ordinance changes to address growing City concerns, handling project engineering and plan review tasks, the latter of which involved up to 14 full plan reviews each week, with an average of 300 per year.
- ▶ **Development Review, City of Aurora, CO.** Plan Review Manager responsible for diverse and **accelerated review assignments by electronic plan check platforms**, with special focus on drainage reviews with a team of 4 full time equivalents. Was assigned an average of 200 reviews last year.

## C. Depth of Staffing



### Miranda Martin

#### Engineering Site Civil Plan Reviewer

Miranda has 22 years' experience managing construction projects and scheduling, and has been responsible for communications with the clients. **Recently, she has extensively provided engineering site civil plan review to various public agencies and has worked in both Accela and Digital Plan Room.**

Miranda has established new plan check department procedures and guidelines and provided plan review of private developments, including water quality and water treatment; stormwater management plans and report; grading plans; erosion control plans; improvement plans; storm drain plans; drainage reports; signing and striping plan; joint trench plans; cost estimates; SWPPP reports and SWPPP plans for agency permit submittals. She has also reviewed survey maps for client submittals. Miranda has prepared and negotiated joint venture agreements with private parties and communicated regularly with assigned principals and office managers relative to project status and performance. Miranda has been responsible for obtaining permits and licenses from appropriate authorities, determining resource needs, including personnel assignments, equipment and materials with attention to budget. Miranda has experience working with: AutoDesk Land Desktop Suite Civil 3D 2016, AES, GIS, GeoMedia, Project and Access, Adobe Acrobat Professional, and Primavera.

#### SELECTED PROJECT EXPERIENCE

► **Engineering Site Civil Plan Review, Various Bay Area agencies; Cities of Cupertino, Lake Elsinore, Murrieta, Jurupa Valley, Hemet, and Moreno Valley, CA**

#### EXPERIENCE

22 Years

#### EDUCATION

BS, Civil Engineering



### Katharyn "Katie" Snyder

#### Engineering Site Civil Plan Reviewer

Katie is a dynamic and highly qualified engineer providing engineering review, highway and road design, drainage, water and sewer engineering services. She has a diverse background on engineering projects including experience with both project and field operation support throughout the entire project cycle, including design, development and project completion. Katie is proficient in AutoCAD, Microstation, HEC-RAS and XPSWMM.

From an **engineering site civil plan review** perspective, she served as a Plan Check Reviewer for the Villages of Lake in the Hills (primarily review of stormwater permits, foundation spot reviews, and plat reviews), Johnsburg, and Richmond. She has also provided **electronic plan review** for a wide array of land development projects (residential, industrial, and commercial) for the City of Denton, Texas. Illinois agencies she has served include Antioch, McHenry, Campton Hills, St. Charles, Elk Grove Village, Johnsburg, McHenry, Ringwood, Somonauk, Oswego, Palos Park, Richmond, and Will County.

For the City of Denton (Texas), Katie has reviewed multiple reviews by set due date each week, and manages the task list of reviews, the record for the overall reviews for the client on HR Green's end and the monthly reports. She had managed the assignment of reviews and tasks to the review team, and managed the overall data for the plan review contract.

#### EXPERIENCE

8 Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION / LICENSE

Engineer-in-Training, IL  
#061-036294

## C. Depth of Staffing



### Angela Saxton, QSD/QSP, CISEC, CESSWI

#### Engineering Site Civil Plan Reviewer (Water Quality)

Angela possesses 15+ years of project management experience with excellent interpersonal skills on land development projects and in the environmental field. She has managed stormwater, source control, remediation projects and supported construction projects. Excelling at implementing solutions that minimize environmental, financial, and regulatory risks, Angela has been successful at achieving compliance with environmental regulations and guidance as well as negotiating and collaborating with governmental/ outside agencies regarding cost-effective solutions. She serves as NPDES Compliance Officer responsible for reviewing Water Quality Management Plans (WQMPs) and Stormwater Management Plans (SWMPs) for various jurisdictions.

This involves coordinating the **electronic, paperless review of these reports and drawings utilizing Bluebeam and Accela/CityView** for commercial and residential projects; consistently meeting city turnaround schedules; facilitating internal meetings and coordinating review meetings with city staff and applicants. She also served as Principal/ President of a consulting firm providing a wide range of environmental compliance management services for land development projects throughout Southern California.

#### EXPERIENCE

15+ Years

#### EDUCATION

Associate of Arts

#### CERTIFICATION

Qualified SWPPP  
Developer/Practitioner, CA  
#21311

CPESC, June 2011

CESSWI, December 2007



### Ken Price, CGCIO, CCM

#### Engineering Site Civil Plan Reviewer (Telecom and Fiber)

Ken brings 30+ years expertise in planning and implementing both short-term and long-term strategies, work plans, budgets, and projects that provide for the planned, orderly, business justified, and cost-effective development, installation and operation of digital systems including information technology, Geographic Information Systems (GIS), networks, and telecommunications technologies. Recently, Ken has served as **Project Manager for a Southern California Association of Governments pilot project to implement moving a city's permitting online and studying/quantifying the results to determine if the program should be expanded to other communities**. The work was funded through state funds, a Future Communities Grant focused on electronic permitting systems. HR Green was tasked with virtual city hall training, deploying the needed software programs, integrating the needed platforms within multiple departments, and tracking the results. He has worked on telecommunications initiatives for 20+ agencies in California, Colorado, Iowa, Illinois, and Texas. **His work has included developing small cell/5G design standards and providing reviews electronically of fiber installation plans and wireless telecommunication facilities applications.**

#### EXPERIENCE

30+ Years

#### EDUCATION

MS, Computer Information  
Systems

BS, Computer Information  
Systems

#### CERTIFICATION

Certified Government Chief  
Information Officer

Certified Change Manager

#### SELECTED PROJECT EXPERIENCE

- ▷ **Developing Wireless Communication Facilities (WCF) and Small Cell Facilities (SCF) policies, which include developing code and ordinances**
- ▷ **Developing WCF and SCF Aesthetic Design Guidelines**
- ▷ **Developing WCF and SCF permit applications and checklists**
- ▷ **Reviewing WCF and SCF permit application submittals, which also includes reviewing RF Reports**
- ▷ **Fiber and broadband visioning and planning**

# C. Depth of Staffing



## Carlos Yado, CBO, ICC-Certified

### Building Permit Plan Task Leader

Carlos brings more than 15 years of supervisory experience of the daily operations of the Building and Code Enforcement Departments for various municipalities. His expertise includes counter customer service, permitting, plan check, field inspection, code interpretation, departmental management and optimization, strategic business planning, and gathering of data and completing required reports. His progressive, customer services oriented, collaborative approach enables departments the opportunity to elevate their potential and increase efficiency and effectiveness. He has implemented and monitored compliance with the applicable building codes and city ordinances, while providing counsel on appropriate alternate construction means and methods. Carlos is proficient using various software applications, including SMARTGov, Bluebeam Revu, TRAKiT, **Accela**, Adobe, e-PlanSoft, and ePermitHub.

#### EXPERIENCE

15+ Years

#### EDUCATION

MBA (in process)

BA, Public Administration

#### ICC CERTIFICATIONS

Certified Building Code Official

Certified Electrical Code Official

Residential Combination Inspector

Combination Inspector

Plumbing Inspector

Mechanical Inspector

Electrical Inspector

Electrical Plans Examiner

California Building Plans Examiner

#### SELECTED PROJECT EXPERIENCE

##### ▷ Building Official/Building and Code Enforcement Manager, Cities of San Juan Capistrano, Palos Verdes Estates, Palm Desert, Hemet, and Whittier, CA

Supervised the daily operations of the Building and Code Enforcement Divisions, including building inspections and code compliance. Recommended and administered policies and procedures. Managed and participated in the development and implementation of Building and Code Enforcement Division’s goals, objectives, policies, and priorities. Assessed and monitored workload, administrative and support systems and internal reporting relationships. Identified opportunities for improvement. Selected, trained, motivated, and evaluated personnel; provided or coordinated staff training; worked with employees to correct deficiencies; implements discipline and termination procedures. Reviewed and approved building plans; conferred with developers, architects, engineers, builders, and contractors; performed plan checks; monitored compliance with Federal, State, and local codes; and recommended modifications as necessary. Served as a liaison between the Divisions, other City divisions, and outside agencies.

##### ▷ Plan Review Services, El Paso County, CO

Provided project management support to manage and implement remote plan review services for development review projects. His team collaborated with County officials, outside agencies, to meet the County’s turnaround times and streamline processes saving time and money for the County and their customers.

##### ▷ Senior Building Inspector/Electrical Plans Examiner, Cities of Irvine, Santa Ana, and Anaheim, CA

Conducted inspections and plan reviews while employed by various cities in Orange County. This includes the cities of Irvine, Santa Ana, and Anaheim. Over this period of diverse experience, he was the plans examiner responsible for electronic and hardcopy review of commercial and residential projects. This included building, mechanical, electrical, plumbing, accessibility, and energy compliance reviews. Also, he conducted various commercial and residential combination inspections. He implemented staff training that engaged his peers to be committed to their professional development along with outside developers and contractors. He is proficient in using various inspection tracking software and electronic plan review software.

“As Building Official for San Juan Capistrano, Carlos played an instrumental role in seamlessly processing our major development. He was very involved at the onset and throughout the project, regularly met with our team, and set up a collaborative, streamlined process and concierge level service through entitlement, permit processing, plan approval and construction acceptance to deliver our project in a timely, efficient, and easy manner.” - **Dan Friess | Principal, Mission Commercial Properties, Inc.**



## C. Depth of Staffing



### Beth Jay, ICC/OES-Certified

#### Building Permit Plan Reviewer

Beth has 15+ years of diverse architectural and building safety experience on a wide variety of projects. She brings architectural, energy, NPDES, green building code, non-structural, mechanical, electrical, plumbing, fire, fire alarm, smoke system, and life-safety plan review experience of residential, commercial, and industrial facilities for the Counties of Los Angeles and Orange and numerous cities throughout the County and other Southern California areas, especially **coastal communities**. Beth is CAL-OES (Office of Emergency Services) certified for natural disasters inspections and recovery.

#### EXPERIENCE

15+ Years

#### EDUCATION

BS, Business Administration

#### CERTIFICATION

ICC-Building Plans Examiner

ICC-Residential Building Inspector

CAL-OES-Certified

**Beth has been involved in the plan review, coordination, tracking and routing of residential, photovoltaic, new hotels, and tenant improvement plans using electronic plan review.**

She has worked on historic preservation projects, as well as seismic retrofits on existing structures and oversees the best practice implementation of building plan reviews for HR Green clients. She focuses extensively on work processes to streamline the intake and reporting of plan review status reporting as well as quality reviews of plans, implemented software solutions to implement paperless Building & Safety operations for permit issuance and inspection. She works closely with agency representatives to establish best practices to effectively coordinate with public agencies, applicants, and other stakeholders.



### Sandra Schmitz, PE, ICC-Certified

#### Building Permit Plan Reviewer

Sandra brings 10+ years of building/structural plan review, design, and counter support for multiple cities throughout Southern California. Sandra has served as a Structural Plan Reviewer responsible for conducting **comprehensive plan reviews using digital commenting** for residential construction (building & life safety, structural, MEPs); structural plan reviews for residential and commercial projects, including single family dwellings, tract homes, tilt-up and CMU warehouses, high-pile storage racks, multi-story hotels, parking garages, temporary stages, etc.; working in-house in multiples cities performing plan review and assisting applicants at the counter; managing office staff to ensure plan review deadlines are met; training new structural plan review staff; and assisting in local office management and acting as main contact in office for questions from client agencies regarding plan review issues.

She is also proficient in the coordination of historic preservation properties and working with various permitting/plan review systems and inventory databases. Sandra has also provided structural design and the processing of building projects through cities and the Division of the State Architect Project.

#### EXPERIENCE

10+ Years

#### EDUCATION

MA, Art History

BS, Architectural Engineering

#### REGISTRATION / CERTIFICATION

Registered Civil Engineer, CA #83448

ICC Certified Building Plans Examiner



## C. Depth of Staffing



### EXPERIENCE

30+ Years

### EDUCATION

MS, AAS, Emergency  
Medicine

### Ken Welch, CFPE, CFM, MCP, CBO

#### Building Permit Plan Reviewer

Ken has more than 30 years in the construction field as a carpenter and electrician, and 20 years of experience in inspections, code enforcement and plan review in local government. He has performed inspections and code enforcement for numerous Chicago-area communities. For the past five years he has provided plan review (using CityView) for a majority of complex building projects processed. Ken is a resident of Nashville, TN and provides plan review across the United States. **For the past few years he has served as the lead building plan reviewer on multi-story, complex buildings for the City of Auburn (Alabama) within a remote, electronic plan review environment.**

#### CERTIFICATIONS (ICC + OTHERS - partial list)

Master Code Professional | Chief Building Official | Building, Housing, Zoning, Fire, Electrical, Mechanical, Plumbing, and Permit Specialist | Building Code Plan Reviewer | Combination Plans Examiner | International Residential and International Commercial Plan Review | Fire Code Plan Reviewer & Inspector | Residential Energy Inspector/Plans Examiner | Certified Fire Marshal | Accessibility Inspector/Plans Examiner | Housing Code Official | Electrical Code Official | Plumbing Code Official | Mechanical Code Official



### EXPERIENCE

20+ Years

### EDUCATION

Certificate in Heating,  
Air Conditioning and  
Refrigeration

### Roger "Rick" Molina, MCP, CBO

#### Building Permit Plan Reviewer

Rick has more than 20 years of experience and holds ICC Certifications as a Certified Building Official and Master Code Professional. He has extensive experience as a skilled fire and life safety inspector, with technical expertise in the electrical and HVAC fields. His qualifications include building plan reviews and inspections for all building disciplines and various types of residential and commercial projects, education, training, and knowledge in all aspects of the construction trade. He has been responsible for the update of new ordinances and codes, **implementation of electronic plan review and permitting systems**, update and installation of annual fire safety inspections, and scheduling inspectors to meet code-designated timeframes. Rick has also provided plan check and permitting services, including processing permits from start to finish and evaluating permitting fees. In addition, he has also owned and managed a successful Electrical and HVAC Company.

#### CERTIFICATIONS (ICC + OTHERS - partial list)

Fire Plans Examiner | Electrical Code Official | Master Code Professional | Residential Plumbing Inspector | Housing Code Official | Permit Technician | Electrical Inspector | Commercial Combination Inspector | Certified Building Official | Mechanical Inspector | Fire Inspector II | Plumbing Plans Examiner | Zoning Inspector | Fire Inspector I | Plumbing Inspector | Commercial Plumbing Inspector | Commercial Building Inspector | Electrical Plans Examiner | Commercial Mechanical Inspector | Building Plans Examiner | Accessibility Inspector/Plans Examiner | Commercial Electrical Inspector | Residential Fire Sprinkler Inspector/Plans Examiner | Residential Mechanical Inspector | Residential Electrical Inspector | Plumbing Code Official | Mechanical Code Official | Building Code Official | Commercial Energy Inspector | Building Inspector | ICC/AACE Property Maintenance and Housing Inspector | Residential Combination Inspector | Mechanical Plans Examiner | Residential Building Inspector | Combination Plans Examiner | Combination Inspector | Permit Specialist | Building Code Specialist | Plumbing Code Specialist | Mechanical Code Specialist | Electrical Code Specialist | Fire Code Specialist | NAFED Portable Fire Extinguisher Technician Housing and Zoning Code Specialist | NIMS Certifications



## C. Depth of Staffing



### Desiree Flores, PE

#### Building Permit Plan Reviewer

A multi-talented and bilingual licensed civil engineer, Desiree has nine years of experience and brings comprehensive experience covering building, engineering, and public works departments, including plan check, staff augmentation, design, and construction management. She has managed/delivered CIP projects, processed permits, responded to public inquiries and utility concerns, reviewed/designed various utility plans, and utilized AutoCAD to design infrastructure plans. Her experience includes **building (electrical, mechanical, plumbing, structural, non-structural) plan review using an electronic/digital commenting through Accela** and over the counter reviews focused on residential, remodels, additions, accessibility, and commercial projects. She has also provided structural design, primarily single- and multi-family residences, in the City of Los Angeles and Los Angeles County. Desiree has **reviewed grading, drainage, and erosion control plans for various municipalities**. She has also provided oversight to earthwork quantities, grading cross-sections, hydrology reports and calculations. In addition, she has designed LID BMPs, implemented SWPPP, and slope analysis.

#### EXPERIENCE

9 Years

#### EDUCATION

MS, Civil Engineering

BS, Civil Engineering

#### REGISTRATION

Registered Civil Engineer,  
CA #89868



### Steve Schwarz, PE

#### Building Permit Plan Reviewer

Steve brings 30 years of experience, including 12 years in prestressed concrete design, roadway, grading, and drainage design and construction experience. He is familiar with the design, production, and transportation of prestressed concrete bridge beams, sound walls, and precast building components. His extensive background in construction, civil engineering, and structural engineering is being leveraged on building and transportation projects within HR Green's Structural Engineering Department.

#### EXPERIENCE

30 Years

#### EDUCATION

BS, Civil Engineering

#### REGISTRATION

Professional Engineer, IL  
#062-048842

Structural Engineer, IL  
#081-006011

**Steve has provided structural plan review services to 15+ Community Development and Building Departments, including the use of electronic plan review and digital commenting.** His focus has been on the review of structural portions of building plans involving primarily commercial and industrial projects.



### Jim Errico

#### Building Permit Plan Reviewer

Jim has an extensive background in **fire protection and building and fire electronic plan reviews and inspections**. His work experience includes commercial and residential projects, with specializations in wet, dry and fire pump system reviews/inspections; sprinkler systems; evaluation and inspection of piping; life safety inspections of commercial occupancies; life safety system plan review and inspections; and building code enforcement.

#### EXPERIENCE

18+ Years

#### CERTIFICATIONS

Fire Inspector | Public School Inspector | Fire Pump Training



## C. Depth of Staffing



### Linda Nguyen

#### Permit Technician Services Task Leader

Linda has 19 years of experience working in local government and professional offices. She has interfaced at all levels with residents, general public, contractors, design professionals, and members of other local government. Linda has provided various permit and front desk services, including calculation and verification of valuation, issuing permits for commercial, residential, and accessory structures, maintaining permit records, and preparing reports for community development directors. She has also tracked plan check applications from submission through approval using various software systems including EnerGov, **Accela**, EDARP, and ePermitHub, routed plan checks via electronic plan review through Bluebeam Studio.

#### EXPERIENCE

19 Years

#### CERTIFICATIONS / TRAINING

ICC Permit Technician (certification approval is pending)

ICC training in Photovoltaic Plan Review and Permit Technician Institute

California Association of Building Officials (CALBO) training for Plan Review of Residential Additions

#### PERMIT SOFTWARE

Accela

EnerGov

Bluebeam

EDARP

#### SELECTED PROJECT EXPERIENCE

##### ► Permit Processing, City of Jurupa Valley, CA

Assisted the plan checkers with updated project status in **Accela** and providing rechecks for building plan reviews. She also provided **fully remote reviews and updates via Accela using Bluebeam for reviews.**

##### ► Plan Review, El Paso County, CO

Project Manager/Reviewer responsible for the **remote review** of Site Development Plans, Special Use, Administrative Relief and Sign applications. She conducted reviews to verify property lines, easements, utilities and associated infrastructure. She reviewed parking, lighting and landscape for El Paso County Land Development Code and Master Plan compliance. Linda also was responsible for the project setup, wrap-up and routing, utilizing the County's online system, EDARP. Plan routing and reviews are conducted in Bluebeam. Linda also served as the primary liaison between County staff and applicants.

##### ► Permit Processing, City of Huntington Beach, CA

Due to unforeseen city staff unavailability, she serves as Permit Technician extension of staff for this coastal community to handle the issuance of encroachment and utility permits and work within the City's automated permitting system.

##### ► Permit Processing, City of Laguna Hills, CA

Permit Technician and handled front counter services, including the supervision of permit technician assistants, and providing training to new administrative staff and consultants. **Linda was instrumental in moving the City to a paperless, electronic plan review process and online over-the-counter applications in 2017. She was a subject matter expert when the City upgraded their land development software. Linda created workflows and updated procedures for the new online streamlined electronic plan review and permitting process.** She was responsible for the receipt and review of building applications and plans from customers to assess scope of project and relevant permit requirements; to educate customers regarding necessary permits and general code compliance of proposed projects and verify that projects have obtained all necessary approvals; and to verify professional and contractor licensing. Linda calculated and verified valuations and fees, generated invoices, and issued permits for commercial, residential and accessory structures. She maintained permit records and prepared reports as required for Community Development Director on monthly and yearly basis. Linda also assisted in completing permit applications. She tracked plan check applications from submission until approval utilizing EnerGov enterprise permitting software; routed plan checks to appropriate personnel via electronic plan review utilizing Bluebeam Studio. She was responsible for calculating all developer, impact, plan review fees related to permitting for new commercial, industrial, and residential projects.

## C. Depth of Staffing



### EXPERIENCE

25+ Years

### EDUCATION

Masters, Homeland Security and Emergency Management

BS, Business Management

AS, Administration and Management

### CERTIFICATION

ICC Permit Technician

### Robert Stauffacher, ICC-Certified

#### Permit Technician

Robert has more than 25 years of experience managing personnel, deadlines and workloads, including more than three years of experience as a building permit technician for the City of San Juan Capistrano. **He has experience with the various automated permitting systems to generate monthly reports, and process and issue refunds.**

He has provided technical customer support to the public, contractors, and licensed professionals, which included receiving and reviewing plans to ensure compliance with city ordinances and State building codes. Robert has been responsible for computing and assessing fees, providing building code, city ordinance, and county requirements/regulations to customers and staff. He has maintained various required tracking logs and systems, updated databases, and processed documents for retention. In addition, Robert has provided research related to permits during submission and historical/previously issued permits as required by the public or members of the city staff. He managed a municipal Construction and Demolition Program, including the intake of documentation and fees, processing forfeitures and refunds, and maintained associated records.

#### SELECTED PROJECT EXPERIENCE

- ▶ Permit Processing, El Paso County, CO
- ▶ Permit Processing/Building Permit Plan Review, City of Hemet, CA
- ▶ Permit Processing, City of San Juan Capistrano, CA



### EXPERIENCE

25+ Years

### EDUCATION

Associate of Arts

### CERTIFICATION

ICC Permit Technician

NIMS - National Incident Management Certifications

### Tina Williams, ICC-Certified

#### Permit Technician

Tina brings more than 25 years of experience in both public and private sectors of the building and safety industry, including permit processing, building inspection tracking and coordination, building and zoning department administration, code enforcement administration, adjudication administration and police and public safety administration.

**She has served as a Permit Technician providing permitting services at various municipalities and also routing and tracking permit applications, plan reviews, and inspections leveraging various automated permitting systems.**

She has interfaced extensively with elected officials, building commissioners, treasurers, police chiefs, code enforcement officers, building inspectors, developers, engineers, architects, and business owners and residents. Tina assists with the planning, coordination, and scheduling of plan check intake, and manages the distribution to the team.

## C. Depth of Staffing



### Kim Evans

#### Permit Technician

Kim brings 30+ years of administrative and CAD support in government, commercial, and residential construction. **She brings extensive experience with the intake, routing, tracking, and processing of plans to the plan review team using a wide variety of automated permitting systems, including Accela.**

Over the years she has worked directly or as a sub-contractor with many contractors. She is very proficient in Microsoft Office and AutoCAD applications. Kim has supported HR Green in the provision of project and budget tracking on civil plan check, map check, telecommunications, and WQMP review contracts.

#### EXPERIENCE

30+ Years

#### EDUCATION

AA, Interior Design

#### CERTIFICATION

ICC Permit Technician

#### SELECTED PROJECT EXPERIENCE

- ▷ **Plan Check Processing, City of Aurora, CO**
- ▷ **Plan Check Processing, Cities of Moreno Valley, Banning, Corona, Desert Hot Springs, Hemet, Pomona, Huntington Beach, Jurupa Valley, Riverside, Pomona, Beverly Hills, Lancaster, Palos Verdes Estates, Upland, Placentia, and Victorville, CA**
- ▷ **Plan Check Processing, Elsinore Valley Municipal Water District and Western Municipal Water District, CA**
- ▷ **Plan Check Processing, Counties of Orange and Imperial, CA**



### Berlyn Castaneda

#### Permit Technician

Berlyn has seven years of experience with municipal governments, providing plan review, **permit processing through Accela**, and complex clerical and technical accounting duties, including accounts receivable, accounts payable, and department specific accounting. She routinely prepares and maintains database records, and generates reports on a regular and as-needed basis. In addition, Berlyn is experienced with the preparation of monthly, quarterly, and year-end financial, summary and other technical reports in various systems, including Accela. She also served as a member of a city's community emergency response team to respond to natural disasters/emergencies.

#### EXPERIENCE

7 Years

#### EDUCATION

College Coursework

**Berlyn reviews and processes encroachment permit applications and coordinates with applicants and contractors.** She also reviews traffic control plans, per WATCH book, related to utility work in the public right-of-way. She has served as a reviewer on development projects for small additions, ADUs, and minor site plan modifications. **Berlyn has handled public document requests which consisted of parcel information research. She has utilized various city and county GIS and records data to determine site restrictions; assisted in the annexation processes by preparing engineer's reports, budgets, and annual assessments; has provided support to the Engineering and Public Works Technicians by communicating directly with applicants, owners, and contractors; and has provided entitlement processing support and writing conditions of approval, upholding city and county standards.**



## 2. APPROACH

## 2. APPROACH

### Project Understanding

Pinellas County is proactively implementing various improvements to enhance cost-effective efficiencies, and facilitate customer responsiveness. These steps include deploying the ePermitHub Digital Plan Room into the County's Access Portal (Accela Civic Platform), creating a team of in-house development facilitators (project managers) within the Building and Development Review Services (BDRS) Department responsible for managing permits from initial receipt to final approval, and leveraging third party plan review consultants with the breadth of technical proficiency to meet or beat your turnaround review schedule performance metrics.

This web-based permit hub combined with a facilitator staffing (Project Manager) model will streamline the permitting process by providing a single-source main point of contact to deliver concierge-level service while promoting a paperless solution and transparency for 24/7 access to County development services.

### We Listen and Have Solutions

#### Special Consideration: MINIMIZE MULTIPLE REVIEWS

We consistently hear from agencies, applicants, and constituents frustrated at experiencing too many review cycles prior to plan approval, blindsided by new review comments made in subsequent reviews, and lack of plan reviewer assigned continuity for each review. This lack of customer service can be found in lackluster satisfaction surveys, heard at Board meetings from vocal constituents, and experienced by County leadership.

**Our Solution:** HR Green prides itself on efficient and effective customer service. Nationwide, **we consistently experience a 98% success rate meeting our public agency review schedules and approvals within three reviews or less for non-over-the-counter projects.** We do this by:

- ▶ Assigning **the same highly qualified plan reviewer to a project from initial review to final approval.** This creates critical continuity and rapport between the applicant and the reviewer to understand the project's needs, City requirements, and what is required for expeditious and efficient approval.
- ▶ Consistently formalizing and automating the intake and review process (our **GreenTREN** program) whether an electronic or manual submittal. This allows for efficient routing of plans, consistent digital comments, tracking logs, and 24/7 access to project status.

#### PINELLAS COUNTY'S NEEDS AND EXPECTATIONS ALIGNED TO YOUR STRATEGIC PLAN INITIATIVES

- ▶ Cost-effective, responsive service
- ▶ Customer-oriented and qualified staff
- ▶ Stellar and seamless communication
- ▶ Timely reviews
- ▶ Streamlined permit processing
- ▶ Concierge, "Top of Class" service with a "personal touch"
- ▶ Proactive public outreach/education
- ▶ Electronic/ web-based tools
- ▶ Digital comments letters
- ▶ High productivity / Efficient service
- ▶ Accurate and complete record keeping to deliver quality and timely response within budget and schedule

- ▶ Working collaboratively with the designers, contractors, and developers to deliver a team approach through cooperation in delivering the final plans.

#### Special Consideration: EFFECTIVE COMMUNICATION

A lack of effective communication between applicants, county departments, regulatory agencies, and the consultant reviewers can extend the review process, foster frustration, negatively impact relationships, and compound inefficiencies. Applicants may not be informed as to submittal requirements or understand Conditions of Approval, code intent, and Certificate of Occupancy requirements or plan submittal requirements. Consequently, either comments grow after plans have already been resubmitted, causing even more delays, and/or otherwise unnecessary re-inspections are required.

**Our Solution:** HR Green prioritizes seamless communication among all stakeholders. We do this by:

- ▶ Facilitating meetings with stakeholders, applicants, architects, and engineering to help secure plans that meet the project objectives and the requirements of a plan submittal, to the extent possible.
- ▶ Utilizing educational handouts and checklists through various avenues (e.g., County website, emails, at the counter, etc.).

## 2. APPROACH

- ▶ Establishing and sharing key submittal metrics and expectations.
- ▶ Taking advantage of internal plan review checklists and forms tied to your permitting system to provide consistency by HR Green staff.
- ▶ Initially meeting, as necessary, with applicants upon receipt of the submittal to clarify the required steps for project approval, code requirements, alternate construction means and methods, key milestones, and contact information.
- ▶ Holding virtual meetings to review digital/manual comments, explain the rationale for these comments, and real-time collaboration to incorporate changes and corrections.
- ▶ Responding to phone calls and emails within one day.

### **Special Consideration: SUPPORT COUNTY STAFF EFFICIENTLY**

A potential issue could be inadequate coordination with County consultants and applicants. This can best be illustrated when there are cascading concerns of inefficiencies due to myriad of issues that could have been avoided. These issues could include not having sufficient qualified staff available to perform the assigned to plan review, not mobilizing enough qualified staff and/or quickly enough to meet current workloads, assigning staff either not familiar with your agency-specific processes and standards or not possessing the customer-centric skills needed which otherwise creates an adversarial relationship.

**Our Solution:** HR Green's greatest resource is our staff and their availability to support your plan check and permitting workload demands. As an employee-owned firm with a 110 year reputation, we embrace and enrich our technical proficiency and communications skills to become trusted advisors and solution finders in who you can have an extremely high level of confidence. Our client agencies expect us to live our Mission: **BUILDING COMMUNITIES. IMPROVING LIVES.**

Our success is grounded in our collective commitment to our Core Values: **Leadership, Performance, Operational Excellence, Collaboration, and Community.** We do this by:

- ▶ Consistently meeting and communicating with the agency staff to establish goals, understand

expectations, monitor current and future workload, and review staff performance.

- ▶ Verifying that all proposed assigned staff seamlessly mirror the background and needs of the County so they can hit the ground running upon notice to proceed.
- ▶ Familiarizing our staff before deployment with your specific agency needs, codes and standards, documentation, performance expectations, and chain of command.
- ▶ Proactively providing ongoing cross-training and financially supporting staff to obtain professional credentials and other critical skills (public speaking, change management, software proficiency, conflict resolution, etc.).
- ▶ Assigning staff that you will get to know and deliver the services you expect in the most cost-effective manner.
- ▶ Mentoring our services to assure that we are delivering what we promised.
- ▶ Providing proper documentation of plan reviews and our interaction to deliver clear communication and seamless processing of plans.
- ▶ Proactively communicating with stakeholders and utilizing best practices.
- ▶ Assigning a Professional Architect as our overall Project Manager with high-level experience and skills in successful mentorship and management of building staff, thorough knowledge of building department policies and procedures, national code development reputation, and partnership with other County departments and outside agencies.
- ▶ Assigning Permit Technicians to provide remote support associated with intake, routing, and document control, including those tasks outlined in the County's RFP.
- ▶ Leveraging Registered Plan Review Engineers/Architects, Master Code Professionals, and ICC and LEED-certified Plans Examiners for thorough and timely plan review that complies with applicable codes, ordinances, design standards, and regulatory requirements.

### **THOROUGH AND ACCURATE**

"HR Green provides **thorough and accurate review** comments to our development engineers and responds quickly to expedited review requests. Their proficiency to collaborate using digital commenting of plans (electronic plan check) has saved us time and money."

Daniel Wozniak | Project Manager  
Pulte Homes Corporation

# 2. APPROACH

- ▶ Staff members will verify proper documentation of plan reviews and customer inquiries to deliver clear communication and seamless processing in your permitting system.
- ▶ Complete standard building and structural plan reviews within the County's stated requirements. Our plan reviewers will work with designers, developers, and contractors with a proactive code compliance effort to limit the number of reviews. HR Green's Plan Review team is capable of consistently meeting or beating agency-established time frames. Please see Page 43 for our plan review timetable.
- ▶ Review site-civil components including items such as stormwater and drainage management, parking, lighting, landscaping, signage etc.

### EFFICIENT AND EXPEDITIOUS PROCESS

"HR Green's electronic plan check system provides instant file delivery to all responsible parties, making the review process more efficient and expeditious; at a glance history of all data transfers; and instant project deadline tracking and notification."

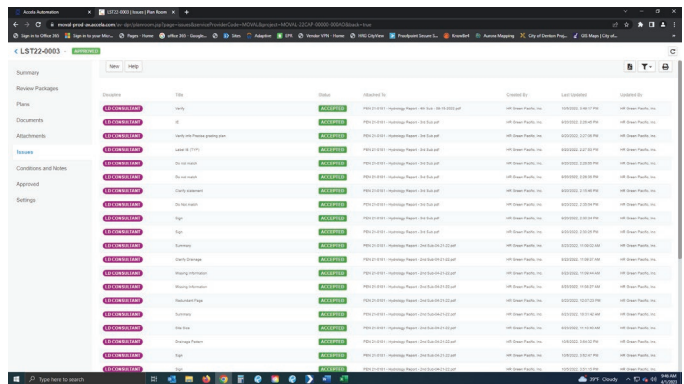
Carmen Barsu, PE, QSD | Public Works Engineering Associate  
City of Pomona, CA

- ▶ Assign qualified HR Green staff who are competent in all plan review disciplines and permit processing who will not only assist with daily duties, but also quickly and effectively respond to natural disasters and emergencies.

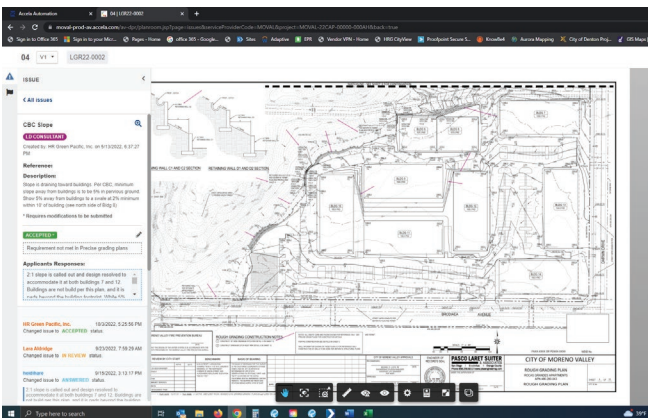
- ▶ Our team will work cohesively with County staff, other departments, stakeholders, business owners, and residents within the communities to facilitate a safe, sustainable, and positive outcome with their applications.

HR Green is ideally suited to accomplish these metrics. We will assign a team of highly qualified plan reviewers and permitting staff (if needed to enhance your processes/Accela system), all of whom have served either as public agency employees or in an extension of staff role. They will be responsive and flexible, exhibit a high level of customer service, provide timely and cost-effective service, and communicate in a detailed and transparent manner.

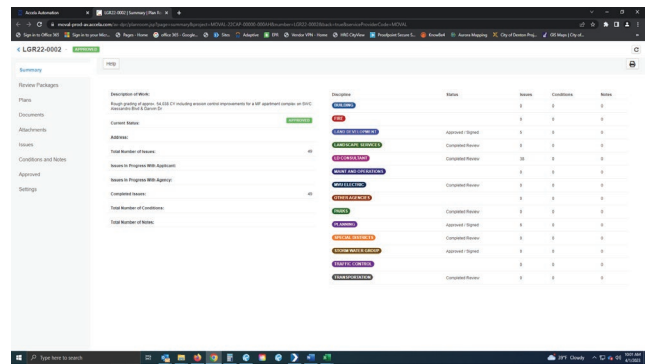
**Our staff will comply with all scope items, duties, and responsibilities detailed in your RFP.**



Sample Digital Plan Room Dashboard



Sample Markup and Digital Comments in Digital Plan Room



Sample Digital Plan Room Review Project Page





## 2. APPROACH

### HR Green's Staffing and Service Delivery Approach

#### **Issue: FIT INTO SPECIFIC MUNICIPAL CULTURE**

**Solution:** Every agency has its own culture, reporting structure, expectations, and goals. Our consultant staff must exhibit utmost professionalism and well-refined interpersonal skillsets to be a team player and seamlessly integrate within your organization while being nimble to respond to changing priorities and emergency situations. Our personnel will carry cellular phones (all staff) for immediate communications and real-time access to your permitting system and paperless/electronic templates, reports, data, logs, etc.

**Note:** Staffing levels and hours will be reviewed with the County so that your needs are met. We also make a commitment to 24/7 access to our staff in the event of responding to emergencies and changing or unforeseen conditions.

#### **Issue: FOLLOW COUNTY PROTOCOLS/PROCESSES**

**Solution:** Our staff will be knowledgeable with applicable codes, amendments, ordinances, design standards, and regulatory requirements. They will be responsible for meeting the performance expectations set forth by the County. Citizens and inter/intra-agency personnel interfacing with HR Green staff must feel they are having the same "transactional business" experience as they would with a County employee.

#### **Issue: FLEXIBILITY/ADAPTABILITY TO RESPOND TO WHATEVER NEEDS ARISE**

**Solution:** Within the municipal arena, there are consistent time sensitive deadlines, emergency issues requiring immediate response, diverse tasks, and potentially changing priorities. Our staff must possess a diverse technical skillset; be nimble, quick, and flexible to embrace change; and possess the ability to effectively transition between such assorted tasks as reviewing plans, analyzing codes and situations to consider appropriateness of alternative materials and methods, writing a staff report, inspecting new construction or improvements, and/or handling permit inquiries.

A successful element of our Alternative Service Delivery philosophy is finding multi-faceted staff who can wear many hats, transition between various roles, and easily transition between different tasks in order to:

- ▶ Maximize utilization and minimize staff levels
- ▶ Maintain service consistency
- ▶ Reduce costs, paper, and storage
- ▶ Maximize a paperless office environment

#### **Issue: MAINTAINING CLEAR & OPEN LINES OF COMMUNICATION**

**Solution:** Maintaining clear and open lines of communication among County staff, permit applicants, developers, engineers, architects, regulatory agencies, and other stakeholders is key to successful program delivery. This includes excellent interpersonal, listening, and problem-solving skills; detailed documentation; insightful progress and staff reports; electronic plan check tools and tracking logs; proficiency of your permitting system; and building consensus to expedite reviews and approvals while mitigating contentious code compliance issues in a spirit of constructive dialogue and harmony.

#### **Innovative/Creative Approaches**

HR Green regularly leverages electronic plan check/digital commenting, permitting database systems, and remote virtual inspections to streamline development review/processing. This can save time for applicants and the County as we utilize this technology to work through building safe and sustainable construction in the County.

#### **EXPERIENCE AND BUSINESS-SENSIBILITY**

"HR Green has successfully performed City Engineering, project support, plan checking, and development reviews for the City since January 2019. The firm brings a **business sensibility** to electronic plan review and engineering management, working closely with our Community Development staff to streamline and assist with the development entitlement process. Further, HR Green is an ideal fit for **combining experience with value** by reducing the amount of paper, time, travel, and costs associated with the plan review process. The use of the virtual cloud promotes real time project tracking."

Christopher Lopez | Former City Manager  
City of Hemet, CA

## 2. APPROACH

### HR Green...At the Forefront of Remote Plan Review and Permitting

HRGreen



For nearly two decades, the HR Green team of reviewers and permit technicians has implemented proven electronic solutions that save time and costs of printing, delivering, handling, and storing copies of plans, documents, and survey records.

Our plan review leaders are industry-recognized thought leaders in advancing the robustness of paperless solutions. Tina and other HR Green professionals have served as technical advisors to paperless data management/reporting software solution providers to incorporate new tools and refine electronic solutions. We leverage and are proficient with various software solutions (e.g., **Accela**, **Digital Plan Room**, Adobe, **Bluebeam Revu**, TRAKIT, EnerGov, Agiline, ePlanSoft, etc.) to not only create a paperless environment, but also provide healthy reporting for smart decision-making. We are constantly implementing the latest tools available in software.

HR Green is dedicated to providing comprehensive, turn-key development review, processing and management services to accelerate processing and approval. This includes blending building plan check, site civil plan check, map check, and telecommunications facilities application review services for cities and counties. Our staff members have worked with cores of agencies nationwide. Key leaders have served as technical advisors to various electronic plan review software providers to enhance the functionality of their systems.

#### PROFESSIONAL AND SOLUTION-ORIENTED

“HR Green staff proved to be very helpful in assisting the property owner address the key concerns city staff and the citizens had with our project impacts. Their **professionalism and the solution oriented**, problem-solving approach made our investment group decide to further increase our Investment capital in the City by moving forward with a second project.”

James M. Kozak | President  
Strategic Land Partners, L.P.

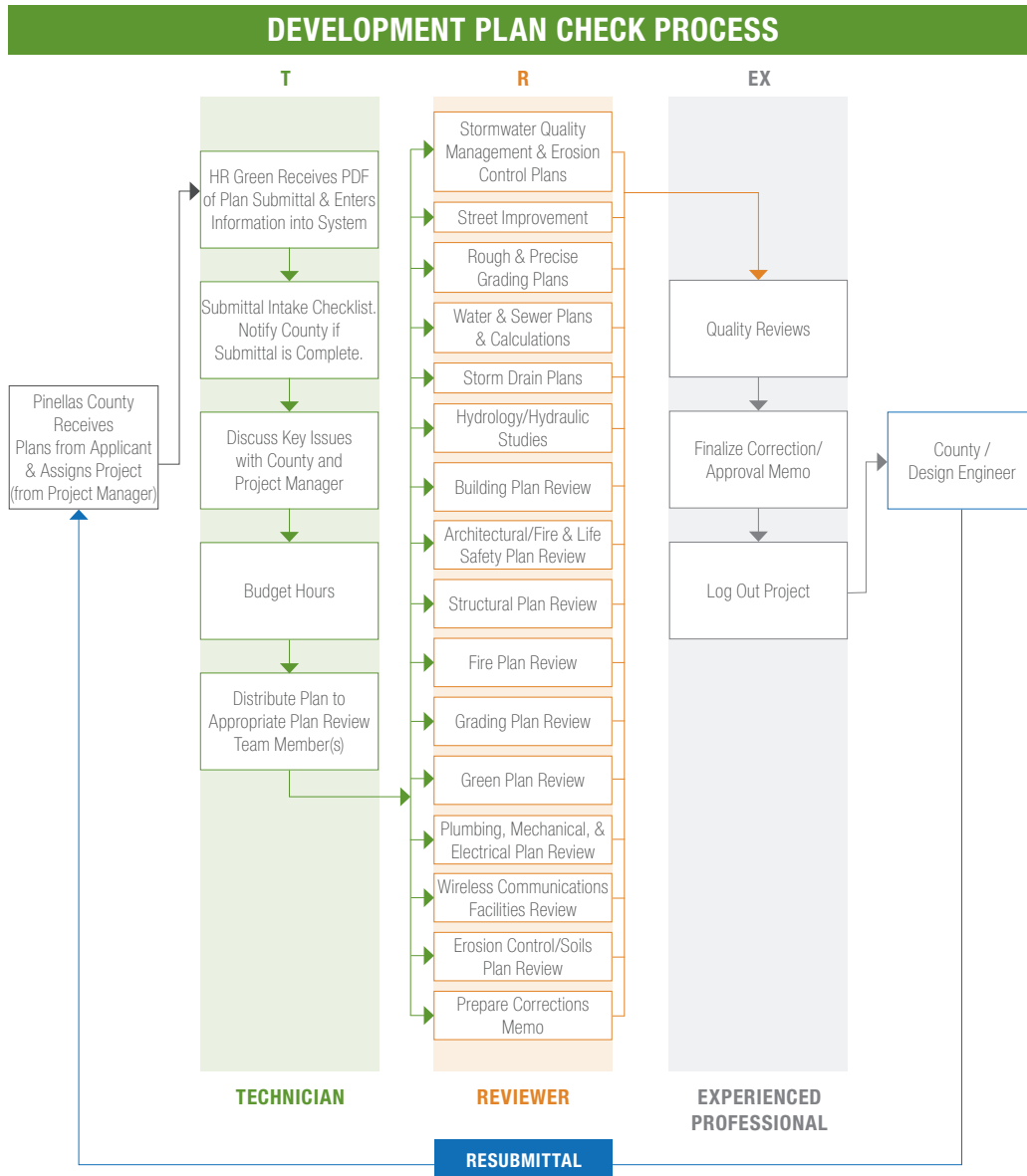
#### Accela Deployment - City of Jurupa Valley, CA

HR Green helped California's newest municipality (incorporated in 2011) with a diverse population of 100,000 transition from County services. One of our key priorities was **creating a streamlined development review process** given the extensive amount of developable land within city limits and City Council desire to foster economic sustainability. **HR Green initially prepared an Operational Review/Assessment that involved multiple departments.** This study identified the implementation of an online/automated permit tracking software as a high priority to improve operational efficiency, transparency and reliability. **In just 13 months, our HR Green staff was able to launch the City's first permit tracking software (Accela interfacing with Agiline CityView 360<sup>o</sup> - a consolidator tool to collect, validate, transform, organize, present and act on information received from several data sources, leading to customized reporting on key performance indicators), enabling Public Works/Engineering, Planning and Building and Safety to directly interface with one another as well as the public, and to create greater efficiency and transparency in the City's operations.** This project required the dedicated effort of all HR Green staff serving the City, including the Project Administrators for the permit software implementation. Our department heads and Permit Technicians, in particular, spent many hours beyond their normal duty assignments in order to test, implement, and deliver this important online permitting and reporting solution to the City. This is a great example of how HR Green takes one of its core values, **Operational Excellence**, to heart, not just for its own operation but for our clients as well. HR Green has also leveraged the use of GIS to manage city assets, code compliance, and maintenance programs, as well as field inspection apps to seamlessly interface paperless reporting through Accela. Our staff members manage all facets of the development planning, review, permitting, and approval process using Accela and an electronic plan check platform, annually reviewing about 1,500+ plan sheets and achieving a 98+% turnaround review success rate.

## 2. APPROACH



HR Green's **GreenTREX** plan review process/program allows us to efficiently complete plan tasks concurrently. This is a formalized and integrated process where **T**echnician data input and processing, **R**eview, and **E**xperienced professional staff manage quality control functions that are consistently implemented on each and every project. This Standard Operating Procedure streamlines the intake, assignment, review, and approval process, promoting collaboration and thorough documentation in a paperless environment. Below is a flowchart of our process which we will follow to meet or beat your plan review turnaround schedule.



## 2. APPROACH

### Distinguishing Features, Skills, and Services

The following elements distinguish HR Green from our competitors:

Our Mission is **BUILDING COMMUNITIES. IMPROVING LIVES.** Since our beginning dating back to 1913, HR Green has done exactly that, serving as a trusted partner to our client communities. Today we serve hundreds of public clients (cities, counties, regional agencies, DOTs) with 670+ dedicated and skilled resources throughout our footprint. Each day, we work to find solutions that inspire our employees, exceed our clients' expectations, and create a lasting legacy in our communities.

We focus on creating staffing and project delivery solutions that address client needs. In Pinellas County's case to address your desires for enhanced efficiencies and reliable technical insight, we will combine a scalable staffing plan with proven best practices to achieve your goals. These skills and services include the following items which have been discussed earlier:

- ▶ Customizing our formalized **GreenTReX** plan check system to streamline the processing, routing, review and approval process
- ▶ Offering scalability and access to our entire in-house, dedicated development processing team (certified building officials, building plan reviewers, civil plan reviewers, map reviewers, wireless telecommunications facilities reviewers, and permit technicians), all of whom have either worked as public agency staff or in a staff augmentation role
- ▶ Leveraging electronic plan review, digital plan review comments, **Accela, Digital Plan Room**, and other web-based solutions to offer a paperless environment that will save time and money, reduce storage needs, enhance collaboration, and offer 24/7 access to project status
- ▶ Enlisting nationwide resources to "extend" the workday across three time zones
- ▶ Deploying our proven track record processing, reviewing, and approving projects for the nation's largest developers around the country

#### HR GREEN DIFFERENTIATORS

- ▶ Proficiency with Accela permitting system and Digital Plan Room
- ▶ Collaborative, solutions-oriented, practical plan review approach
- ▶ All staff members have worked as government employees or as an extension of staff
- ▶ Registered engineers/ architects and certified staff
- ▶ Electronic plan check/ digital commenting expertise
- ▶ Proven track record meeting or beating plan review turnaround schedules
- ▶ 50+ staff dedicated to turnkey development processing
- ▶ No conflict of interest
- ▶ Successful track record processing projects of the nation's largest developers
- ▶ 98% success rate approving projects within three review cycles or less

#### PROACTIVE AND TIMELY PROCESSING

"HR Green has played an instrumental role in coordinating the processing our 225-acre mixed use development. Their understanding of development, management approach and knowledgeable team have resulted in **timely processing** the various aspects of our project while protecting the agency. We are currently working with the HR Green team in various aspects of our development, including engineering plan check. Their staff have been **very proactive** in interacting with our team early in the project concept process to gain planning and entitlement approval. They have provided concierge-level attention with timely and meaningful comments - thereby helping to accelerate approvals and minimize delays."

Matthew Dugally | Principal  
DO Capital Group

## 2. APPROACH

### Our Value-Added Services

LOOKING  
FORWARD



#### STAFF DEVELOPMENT/TRAINING/ COMMUNITY WORKSHOPS

While the success of our work products relies on our team of professionals to deliver exceptional service to the County, we can utilize

them to further assist in many other ways. HR Green can support and provide staff training that will help the County's team grow their potential to better serve your communities. We can also facilitate code training and workshops with developers, applicants, land development engineers and architects. These efforts can include technical training topics, team building exercises, information guides, flowcharts, checklists, and website tools, along with workshops with County constituents to better understand our obligation as code professionals in the built environment and how to streamline the processing and approvals per codes and amendments.

Our **Overall Project/Contract Manager, Frank Urbina, NCARB, AIA, APA ALA, and the HR Green Team** have extensive knowledge in Building Official-related tasks including fee analysis, code adoption, legislative updates, and many other changes that come from enforcing building code regulations. Together, through our partnership with the County, we can leverage our mutual strengths to be able to provide the highest level of customer service and provide the best solutions for how we approach development review services to Pinellas County. This enables the County to elevate and enhance your overall Building and Development Review Services (BDRS) operations and exceed expectations from the communities.

#### RATE STUDIES

Many agencies are faced with managing building and development services associated with outdated fee schedules which place an unnecessary financial and cost of service burden on supporting key departmental responsibilities (plan review, permitting, and inspection) to process and approve projects which otherwise mitigate impacts on public improvements, public services, and community amenities. As we have done for other agencies, should the County so desire HR Green can assess your current building department fees, compared to similar, nearby jurisdictions, and recommend appropriate fees

and allocated percentages/rates that support the full cost recovery of services. Any revised fee program must comply with your Government Code.

#### TELECOM / FIBER REVIEW

HR Green is at the forefront of review and implementation of broadband, fiber optics, small cell, and 5G technology. The September 26, 2018 FCC Small Cell Preemption Order was meant to accelerate small cell and 5G deployment nationally. HR Green has helped 20+ agencies nationally maintain a significant amount of authority and flexibility by negotiating win-win outcomes that benefit carriers while addressing key community concerns, such as aesthetics, availability of high-speed telecommunications, and public safety. This includes, but is not limited to public policy development, design standards development, plan review, permit processing, co-location agreements, and inspection.

#### Telecommunication Reviews - Reliable Practices for the Future Generations

While reviewing the plans, we work expeditiously to address issues of importance and verify the aesthetics, RF requirements, and final product meet your expectations.

#### Completeness of Applications

Incomplete applications are often a problem with submittals for all types of municipal permits, including telecommunications installations. The FCC recognizes this issue within their review timelines, aka, shot clocks. Agencies may "Toll" the shot clock if the application is reviewed and notice is provided within 10 days (per FCC Small Cell Order 18-133 for telecommunications facilities installations) of initial submittal specifically identifying what is incomplete or missing. HR Green seeks to perform the completeness review well within that timeframe. These notices would be sent directly to the applicant with a copy to the County.

#### Shot Clock Review Timeframes

HR Green seeks to process the applications as expeditiously as possible so that the agency's rights are protected. Through the adoption of FCC Small Cell Order (18-133) and other related regulations, the FCC has placed strict timelines on agencies for reviewing telecommunications applications as well as their ability to control what lies within County-owned rights-of-way with little regard for the County's need to protect their single most valuable asset. Without proper oversight, these regulations threaten significant damage to this infrastructure.





## 3. STATEMENT OF WORK

## 3. STATEMENT OF WORK

Once the County provides a notice-to-proceed, our Project Manager and Service Task Leaders will meet with applicable County staff to identify your staffing requirements and establish best practice protocols for your plan review and permitting needs consistent with the standards established by the BDRS Building Official. We will initiate a staff and resource management plan that is appropriate to the nature of your staffing needs, be it a long-term assignment; a specific, complex project; and/or as-needed remote staffing coverage due to vacations, illness, etc.

For a period of 2-3 days assigned HR Green staff will participate in virtual training of Pinellas County processes, including but not limited to the County's Accela platform for both Building and DRS, Digital Plan Room Standard Operating Procedures, remote portal training, VuSpex training and DRS Engineering, and Environmental Site Plan/Building permit Standard Operating Procedures. Upon successful completion of training, HR Green staff members will be working remotely unless as directed by the County. Assignments will be sent via electronic method.

Permit plan reviews will be performed remotely via electronic access within the County's Accela platform by using electronic plan review (Digital Plan Room). Types of reviews include:

- ▶ Commercial and residential reviews
- ▶ Multi-trade plan reviews, including mechanical, electrical, plumbing, and structural

### Building Permit Plan Review

#### Step 1 - Preliminary Discussions

Prior to beginning our initial plan check project, our Building Plan Review Task Leader will conduct a meeting or conference call with the County to discuss County and other local jurisdictional code policies, documentation procedures, plan processing protocols, plan review checklist items, and scheduling.

#### Step 2 - Initial Review

Once we receive a complete set of plan documents, we will perform our plan review in the prescribed time frame, checking for compliance to all applicable code standards. All corrections are identified based on compliance with

specified codes and regulations and worded so the designer will know what needs attention and how to respond to the issue stated. Corrections will be identified in two ways:

- ▶ Notes made on plans as appropriate and authorized to assist in locating the issue on the plans.
- ▶ A correction sheet detailing what items need to be addressed before plan approval.

You will receive a copy of each correction list, as well as a cover memo containing the following:

- ▶ The date plans were reviewed by our plan review staff
- ▶ The date that the applicant/applicant's designee was notified that the plan review was completed
- ▶ The name and phone number of the applicant/applicant's designee that was notified that the plan review was completed

#### Step 3 - Transmittal of Plans and Comment Lists for Plan Check

At the heart of our approach in delivering our services to you is the recognition that there must be a coordinated effort to track and coordinate all submittals and requests received. To help assure that submittals are properly coordinated and tracked, we have established an internal plan check coordination process (**GreenTREx**) in which each plan received for review is properly handled, processed through the Digital Plan Room and returned on time. Upon completion of our review, any comments generated are consolidated into a correction letter which is forwarded to the applicant; at the same time, an electronic copy will be sent to the County for your reference. At your discretion, upon completion of the initial plan review, a debrief between our staff and the County can be coordinated to verify our firm is aligning with your expectations.

#### Step 4 - Rerechecks

Upon receipt of the resubmittal package from the applicant, we will notify the County that we have received the package. Once we have verified that the resubmittal package is complete, we will perform a recheck in the agreed-upon time frame. This process will be repeated until the project plan documents are ready to be recommended for approval. We will aspire to achieve approval within no more than three reviews.

## 3. STATEMENT OF WORK

### Step 5 - Plan Approval

Upon plan approval, our team will present to you the requested number of approved building plans, a copy of the review sheet with all completed items appropriately signed off, a letter of transmittal stating the conditions, if any, of approval (such as fees due, necessary agency approval(s), or minor items to be completed), and all other pertinent documents.

Our plan tracking procedures are computerized to track each submittal through the review process and maintain accurate and comprehensive records for each submittal.

Our electronic plan review letters are formatted per specialty areas. They also list each plan review sheet to distinguish from plan resubmittals, as well as the date of the plans and all submittal supporting documents. In addition, our review letters all conclude with the name, phone number and email for each plan reviewer listed so that design professionals or permit applicants may contact them with any question(s) pertaining to the review comments or the project in general. For your projects, our goal is to limit the number of plan submittals for rapid permit release and to get to ground-breaking, ribbon-cutting, and, for buildings, a final Certificate of Occupancy to be issued.

### Electronic Plan Review / Tracking of Review Comments

We will track review comments to verify that each comment has been addressed by the design team. This is critical on larger, multi-disciplined projects where there may be overlap between design disciplines. Comments from each review cycle will be summarized electronically by our staff. Design responses shall be added and included with the next submittal to verify that all comments have been addressed. This approach has been effective in resolving comments at early stages, avoiding repeat comments by reviewers, and coordinating responses among disciplines. Our goal on more complex projects is to achieve approvals within no more than three reviews.

### Plan Review Tracking Log

A key to maintain close communication is the ability to give the stakeholders status updates on where their projects are in the review process. One tool our QA/QC experts have developed and used successfully for various cities is a tracking log. This will be customized according to your needs.

### Development/Updating of Policies & Procedures

We will provide/enforce the latest adopted building codes. Should the County so desire, we can update ordinances design standards, procedures, and your technical review checklists customized to applicable design standards and the current codes for improvements, special provisions and cost estimates. The checklists incorporate lessons learned from past projects into future projects and are an effective tool for maintaining consistency and conformance during the submittal review process.

### Remote Permitting Services

Our permit technicians will work remotely, leveraging the County's Accela and Digital Plan Room platform to provide support services associated with permit completeness, fee formulation, certificate of occupancy issuance and related services. These services will include the review of private provider filings. Our staff will be available during the County's hours of operation.

- ▶ **Regular business hours:** Monday - Friday, 7:30 AM-4:30 PM
- ▶ **Weekends:** Saturday and Sunday (only if authorized by the County)
- ▶ **Holidays:** County holidays as designated on the County's official calendar (only if authorized by the County)



## 3. STATEMENT OF WORK

### DRS Site Plan Engineering & Site Plan Services

#### Step 1 - Preliminary Discussions

Prior to beginning our initial plan check project, our Site Plan Engineering Review Task Leader and Permit Technician will review the submittal for completeness and area of design concern. If necessary, we will conduct a meeting or conference call with the applicant and/or County to discuss the concerns, code policies, documentation procedures, plan processing protocols, plan review checklist items, and scheduling.

#### Step 2 – Initial Review

Once HR Green receives a complete set of plan documents, we will perform our plan review electronically in the agreed-upon time frame, checking for compliance to all applicable codes and standards. At your discretion, upon completion of the initial plan review a debrief between our staff and the County can be coordinated so that our firm is aligning with the County's expectations. Marked up plans, the corrections memo, and a transmittal will be sent electronically to the County, engineer of work, and developer.

#### Step 3 - Rechecks

Upon receipt of the resubmittal package from the applicant, we will verify that the resubmittal package is complete. We will assign the package to the same reviewer who provided the prior review and perform a recheck in the agreed-upon timeframe. This process will be repeated until the project plan documents are ready to be recommended for approval. As part of our review process, we verify quantities and the engineer's cost estimate.

#### Step 4 – Plan Approval

Once all comments have been addressed, HR Green will request the mylars which will receive a final review by the Plan Review Task Leader who will initial when complete. The mylars will be transmitted to the County with a letter recommending approval and assert the final product is in substantial conformance with applicable local, county, state, and federal requirements.

### 3. STATEMENT OF WORK

#### MEETING / BEATING YOUR BUILDING PLAN REVIEW TURNAROUND EXPECTATIONS

Our plan review will be handled through your paperless electronic plan check/digital commenting process to the maximum extent possible. Through HR Green’s extensive experience with plan check services and our own in-house process, our staff shall consistently meet or beat your service level goals in the performance of our plan check work as laid out below:

Electronic Plan Review Service Level Commitments					
	Building Division Plan Reviews		DRS Site Plan Engineering & Site Plan Services		
Review Cycle	Residential	Commercial	Site Plan (Simple)	Site Plan (Complex)	Right-of-Way Utilization Permits
Pinellas County (1st Review)	3 business days	5 business days	5-8 business days	10-15 business days	8 business days
HR Green (1st Review)	3-5 business days	5-7 business days	5-8 business days	10-15 business days	8 business days
Pinellas County (2nd Review)	2 business days	3 business days	5 business days	10 business days	5 business days
HR Green (2nd Review)	2-3 business days	3-5 business days	5 business days	10 business days	5 business days
Pinellas County (3rd Review)	2 business days	2 business days	5 business days	7 business days	
HR Green (3rd Review)	2-3 business days	2-4 business days	5 business days	7 business days	

**Please note, once we have a better understanding of the volume of permit activity, we could revisit the turnaround times shown above.**

At the conclusion of each development review, our reviewer digitally stamps (signs hard copies) the title sheet of the redlined document or the cover page on reports with the date, reviewer’s initials, and submittal number. The redlines, a comprehensive comment letter, and checklist are provided to all stakeholders. All documents are turned around on-time or ahead of schedule. HR Green earnestly seeks to meet or beat your expectations. We are able to meet the most hard-hitting schedules with a near perfect track record.

#### PLAN REVIEW TURNAROUND NOTES:

1. Turnaround times depend on the complexity of the project.
2. Our plan review process will provide for an initial plan review, and two additional re-checks under the plan review fees paid at the time of plan review submittal (three plan review rounds total).
3. Large scale and complex commercial/industrial projects may take up to 20 business days for first review based upon their complexity. These include, but are not limited to, high rise buildings, multi-story mixed use, and projects with multiple buildings exceeding 25,000 sf. or larger.

Our staff is knowledgeable and proficient using the Accela permitting and Digital Plan Room systems, and will provide updates and status reports as desired by the County. We will work closely with applicants so that projects will not go through useless rounds of corrections or comments. We pride our ourselves on a work product that can effectively and efficiently deliver the highest quality plan review while partnering with designers, developers, contractors, and others in order to work through any code deficiencies that enables a prompt turnaround of approved plans.

# 3. STATEMENT OF WORK

## As-Needed Services

HR Green shall provide the following services:

- ▶ Site plan, Right-of-Way Use Permit, subdivision plats, waivers and similar documents review assistance regarding transportation, stormwater, floodplain management, and the Land Development Code (LDC).
- ▶ Participation in permitting meetings virtually with County staff. Conversations with third-party consultants and engineers will be coordinated through County Development Review Services (DRS) staff (to be included in each site plan review fee).
- ▶ Participation in public and other meetings as subject matter experts on behalf of the County with prior approval from DRS staff (to be performed on an hourly basis).
- ▶ If required, HR Green will prepare presentations and present the results to County management, stakeholders, or the Board of County Commissioners (BCC) (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with transportation, flooding, drainage, and related complaint investigations (to be performed on an hourly basis).
- ▶ Meeting summaries on transportation and stormwater aspects of projects will be provided within five (5) business days of the meeting.
- ▶ Technical summaries and permit and waiver reviews will be submitted in accordance with the County's review timelines (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with interpreting or peer reviewing transportation, flood and drainage related designs, models, and other engineering documents (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with variance requests (to be performed on an hourly basis).
- ▶ Prepare review comment letters (to be included in each site plan review fee).
- ▶ Attend Development Review Committee (DRC) meetings virtually (to be included in each site plan review fee).

## Deliverables

Technical, reviews, technical recommendations, and site visit summaries will be provided electronically as brief technical memos, emails, or PDF markups, as appropriate.

## Assumptions & Exclusions/Limitations

- ▶ All documents (e.g., surveys, plans, calculations, models, GIS data, reports, and other relevant data) necessary to complete reviews shall be provided in a timely manner by the County.
- ▶ Site Plan, Right of Way Use Permit, subdivision plats, and waiver reviews generated by HR Green will be entered by the County into Accela or other tracking software. Such software licenses, if required, will be provided by the County at the County's expense.
- ▶ Meetings will be scheduled and coordinated by the County. HR Green shall provide adequate notice of availability to attend meetings. In cases where calendar conflicts cannot be resolved HR Green shall send a qualified representative to the meeting.
- ▶ Plat reviews are not included.



## 4. RFP EXCEPTIONS

## 4. RFP EXCEPTIONS

The County RFP and Terms and Conditions contain language that should be modified or clarified to be more specific to the services being delivered. Based on our review, we believe revisions will provide greater clarity as to contractual obligations as well as compliance with state law requirements, which will benefit both parties. For example, the standard of care, insurance and indemnification language would be uninsurable/unavailable as written, which would frustrate the County's desired outcome to involve those resources if needed. If selected, HR Green would like the opportunity to work with the County to develop the proposed agreement and address very specific issues. We would be prepared to discuss these matters immediately upon selection to assure that no time is lost and that the proposed work can be carried out in a timely manner.

**Our exceptions to both the RFP and Terms and Conditions are detailed in Section 2.3 on your procurement website.**



HRGreen®

**Building Communities.  
Improving Lives.**

TRANSPORTATION  
+  
WATER  
+  
GOVERNMENTAL SERVICES  
+  
LAND DEVELOPMENT  
+  
ENVIRONMENTAL  
+  
CONSTRUCTION

▷ [HRGREEN.COM](http://HRGREEN.COM)

**BUILDING DEVELOPMENT REVIEW (BDRS) ON-CALL SERVICES**

**RFP NO. 23-0482-P**

**HR Green, Inc.**

**1. Building Services - Plan Examining Services - Hourly Cost**

<b>Service</b>	<b>Type</b>	<b>UOM</b>	<b>Hourly Rate</b>
Plan Examining	Residential - New Review	Per Hour	\$162.00
Plan Examining	Residential - Remodel Review	Per Hour	\$155.00
Plan Examining	Residential - Simple Review	Per Hour	\$155.00
Plan Examining	Commercial - New Multi-Trade (all trades) Review	Per Hour	\$162.00
Plan Examining	Commercial - New Single Trade Review	Per Hour	\$155.00
Plan Examining	Commercial - Remodel Multi-Trade (all trades) Review	Per Hour	\$162.00
Plan Examining	Commercial - Remodel Single Trade Review	Per Hour	\$155.00
Plan Examining	Commercial - Simple Multi-Trade (all trades) Review	Per Hour	\$162.00
Plan Examining	Commercial - Simple Single Trade Review	Per Hour	\$155.00
Plan Examining	Commercial - Single Trade Project Review	Per Hour	\$155.00

**2. Building Services - Plan Examining Services - Fixed Unit Cost**

<b>Service</b>	<b>Type</b>	<b>UOM</b>	<b>Fixed Unit Cost</b>
Plan Examining	Residential - New Review	Each	\$810.00
Plan Examining	Residential - Remodel Review	Each	\$620.00
Plan Examining	Residential - Simple Review	Each	\$465.00
Plan Examining	Commercial - New Multi-Trade (all trades) Review	Each	\$3,888.00
Plan Examining	Commercial - New Single Trade Review	Each	\$1,240.00
Plan Examining	Commercial - Remodel Multi-Trade (all trades) Review	Each	\$2,592.00
Plan Examining	Commercial - Remodel Single Trade Review	Each	\$620.00
Plan Examining	Commercial - Simple Multi-Trade (all trades) Review	Each	\$1,296.00
Plan Examining	Commercial - Simple Single Trade Review	Each	\$620.00
Plan Examining	Commercial - Single Trade Project Review	Each	\$620.00

**NOTES:**

1. Commercial project submittals over 5,000 sq. ft. or Multi-Story will be billed hourly at our prescribed bill rates as these projects will vary based on size and complexity.
2. Fixed unit costs are for the first plan submittal review. Additional reviews will be billed at our prescribed

**3. Building Services - Inspection Services - Hourly Cost**

<b>Service</b>	<b>Type</b>	<b>UOM</b>	<b>Hourly Rate</b>
Inspection (In-Person)	Residential - Building (all trades)	Per Hour	N/A
Inspection (In-Person)	Commercial - Multi-Trade (all trades) License	Per Hour	N/A
Inspection (In-Person)	Commercial - Single Trade	Per Hour	N/A
Inspection (virtual)	Residential	Per Hour	N/A
Inspection (virtual)	Commercial Multi-Trade (all trades) License	Per Hour	N/A
Inspection (virtual)	Commercial Single Trade	Per Hour	N/A

**BUILDING DEVELOPMENT REVIEW (BDRS) ON-CALL SERVICES**

**RFP NO. 23-0482-P**

**4. Building Services - Inspection Services - Fixed Unit Cost**

Service	Type	UOM	Fixed Unit Cost
Inspection (In-Person)	Residential - Building (all trades)	Each	N/A
Inspection (In-Person)	Commercial - Multi-Trade (all trades) License	Each	N/A
Inspection (In-Person)	Commercial - Single Trade	Each	N/A
Inspection (virtual)	Residential - Building (all trades)	Each	N/A
Inspection (virtual)	Commercial - Multi-Trade (all trades) License	Each	N/A
Inspection (virtual)	Commercial Single Trade	Each	N/A

**5. Building Services - Permit Technician - Hourly Cost**

Service	Type	UOM	Hourly Rate
Permit Technician	Support services associated with permit completeness, fee formulation, certificate of occupancy issuance, and related services.	Per Hour	\$110.00

**6. Development Review Services (DRS) - Engineering Services - Hourly Cost**

Service	Type	UOM	Hourly Rate
Engineering Consulting	Standard - Site Plan (includes zoning and full scope of site engineering)	Per Hour	\$200.00
Engineering Consulting	Complex - Site Plan (includes zoning and full scope of site engineering)	Per Hour	\$200.00

**NOTE:**

Hourly rate is estimate. Actual rate is based on staffing level between \$185 and \$215.

**7. Development Review Services (DRS) - Engineering Services - Fixed Unit Cost**

Service	Type	UOM	Fixed Unit Cost
Engineering Consulting	Standard - Site Plan (includes zoning and full scope of site engineering).	Each	\$2,000.00
Engineering Consulting	Complex - Site Plan (includes zoning and full scope of site engineering)	Each	\$5,000.00

**8. Development Review Services (DRS) - Building Permit Review - Hourly Cost**

Service	Type	UOM	Hourly Rate
Permit Review	Right-of-Way Use Permits	Per Hour	\$200.00
Permit Review	Waivers	Per Hour	\$200.00
Permit Review	Inspections	Per Hour	N/A

**NOTE:**

Hourly rate is estimate. Actual rate is based on staffing level between \$185 and \$215.



**BUILDING DEVELOPMENT REVIEW (BDRS) ON-CALL SERVICES**  
**RFP NO. 23-0482-P**

**9. Development Review Services (DRS) - Environmental - Hourly Cost**

<b>Service</b>	<b>Type</b>	<b>UOM</b>	<b>Hourly Rate</b>
Site Plans	Environmental/Habitat	Per Hour	\$200.00
Building Permits	Environmental/Habitat	Per Hour	\$200.00
Inspections	Environmental/Habitat	Per Hour	N/A

**10. Development Review Services (DRS) - Environmental - Fixed Unit Cost**

<b>Service</b>	<b>Type</b>	<b>UOM</b>	<b>Fixed Unit Cost</b>
Site Plans	Environmental/Habitat	Each	\$2,000.00
Building Permits	Environmental/Habitat	Each	\$2,000.00
Inspections	Environmental/Habitat	Each	N/A

## 9. SAMPLE AGREEMENT

### AGREEMENT

23-0482-RFP

*The sample agreement below reflects the contract terms and conditions specific to this solicitation. For purposes of this sample, the “Contractor” is the successful Respondent. By submitting a submission in response to this solicitation, the Contractor acknowledges and agrees that if they are awarded a contract under this solicitation, they will enter a contract in substantially this form and subject to these terms.*

This Agreement (the “agreement” or “contract”) is entered into on the date last executed below (“Effective Date”), by and between Pinellas County, a subdivision of the State of Florida whose primary address is 315 Court Street, Clearwater, Florida 33756 (“COUNTY”) and [CONTRACTOR’S NAME] whose primary address is [Address] (hereinafter “CONTRACTOR” or “Custodian”) (jointly, the “Parties”).

***NOW THEREFORE, the Parties agree as follows:***

#### **A. Documents Comprising Agreement**

1. This Agreement, including the Exhibits listed below, constitutes the entire agreement and understanding of the Parties with respect to the transactions and services contemplated hereby and supersedes all prior agreements, arrangements, and understandings relating to the subject matter of the Agreement. The documents listed below are hereby incorporated into and made a part of this Agreement:
  - a. This Agreement
  - b. Pinellas County Standard Terms & Conditions, located on Pinellas County Purchasing's website, effective 1/1/2023, posted at <https://pinellas.gov/county-standard-terms-conditions/>
  - c. Solicitation Section 4, Titled Special Conditions
  - d. Solicitation Section 5, Titled Insurance Requirements
  - e. Contractor's response to Solicitation Section 6, Scope of Work / Specifications
  - f. Contractor's response to Solicitation Section 9, Pricing Proposal
2. In the case of a conflict, the terms of this document govern, followed by the terms of the attached Exhibits, which control in the order listed above.

#### **B. Term**

1. The initial term of this Agreement is for 24 months from the Effective Date. At the end of the initial term of this contract, this Agreement may be extended for one (1), 12 month terms, or such other renewal terms agreed to by the Parties.

#### **C. Pricing & Expenditures Cap**

1. Payment and pricing terms for the initial and renewal terms are [list payment terms OR “subject to the cost or fee schedule in the CONTRACTOR’s Statement of Work”].  
Notwithstanding the above, County expenditures under the Agreement will not exceed [TBD \$XXX] for [“the Contract term” or “any County fiscal year”] without a written amendment to this Agreement.

**D. Exceptions**


1. The following provisions of the T&Cs are amended as follows. Except as expressly provided in this Section 2, the terms of documents composing the Agreement remain in full force and effect:
  - a. [List any exceptions here] **Note:** Please reference the attachment for HR Green's exceptions.
  - b. [List any exceptions here]

**E. Entire Agreement**

1. This Agreement constitutes the entire agreement between the Parties.

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their undersigned officials, who are duly authorized to bind the Parties to the Agreement.

For Contractor: HR Green, Inc.

Signature: 

Print Name and Title: Timothy J. Hartnett / Vice President

Date: April 6, 2023

For County:

Signature:

Print Name and Title:

Date:

# HR Green Inc. Exceptions

The County RFP and Terms and Conditions contain language that should be modified or clarified to be more specific to the services being delivered. Based on our review, we believe revisions will provide greater clarity as to contractual obligations as well as compliance with state law requirements, which will benefit both parties. For example, the standard of care, insurance and indemnification language would be uninsurable/unavailable as written, which would frustrate the County's desired outcome to involve those resources if needed. If selected, HR Green would like the opportunity to work with the County to develop the proposed agreement and address very specific issues. We would be prepared to discuss these matters immediately upon selection to assure that no time is lost and that the proposed work can be carried out in a timely manner.

## 23-0482 REQUEST FOR PROPOSAL

Under **Section 3.2. INSTRUCTIONS & PROCEDURES, subsection 7**, we suggest deletion of first sentence. (page 7)

We request clarification of **Section 3.13. CONTRACTOR LICENSE REQUIREMENT**. The scope of this RFP is associated with consulting services. We do not have a contractor license, but do hold a firm engineering license. (page 13)

We request removal of **Section 3.15. DESCRIPTION OF GOODS/SERVICES/SUPPLIES** which is not applicable to the requested scope of work. (page 14)

We request removal of **Sections 3.24. PROCUREMENT POLICY FOR RECYCLED MATERIALS, 3.25 PROVISION FOR OTHER AGENCIES, and 3.26 PUBLIC EMERGENCIES** which are not applicable to the requested scope of work. (pages 16-17)

We request removal of **Sections 4.8. ASBESTOS MATERIALS, 4.10. GOODS & PRODUCTS, 4.11. QUANTITIES, and 4.12. PERFORMANCE SECURITY** which are not part of the requested scope of work. (pages 21-22)

Under **Section 6.4. SCOPE OF WORK - BUILDING DIVISION**, subsection **COUNTY RESPONSIBILITIES**, suggest removal of the second bullet (page 31)

Under **Section 6.4. SCOPE OF WORK - BUILDING DIVISION**, subsection **SECURITY REQUIREMENTS**, suggest removal of the second and fourth bullets (page 31)

## TERMS AND CONDITIONS

We request removal of **Section 5. Cooperative Use of Contract By Other Government Agencies** (page 5)

We request edits to **Section E. Right to Ownership** as follows: (page 11)

"All work created, originated and/or prepared by CONTRACTOR in performing Services including documentation or improvements related thereto, to the extent that such work, products, documentation, materials or information are described in or required by the Services (collectively, the "Work Product") will become COUNTY's property when completed and accepted, if acceptance is required in this Agreement, and the COUNTY has made payment of the sums due therefore. COUNTY shall have a non-exclude, irrevocable license to use Contractor copyrights and intellectual property incorporated into the Instruments of Service. Any data, information or other materials furnished by the COUNTY for use by CONTRACTOR under this Agreement will remain the sole property of the COUNTY. Instruments of Service are not intended or represented to be suitable for reuse by the COUNTY or others on any other project. Any such use without the CONTRACTOR's prior written authorization shall be at the COUNTY's sole risk and without liability to the CONTRACTOR. The COUNTY agrees to waive all claims against CONTRACTOR for any and all liabilities, damages, and costs arising out of or related to the misuse or unauthorized reuse of Instruments of Service."

We request removal of **Sections 18. EQUIPMENT MAINTENANCE and 19. DIGITAL CONTENT** (pages 15-16)

We request removal of **Section 20. ACQUISITION OF GOODS OR PRODUCTS** (pages 16-18)





## 2. APPROACH

## 2. APPROACH

### Project Understanding

Pinellas County is proactively implementing various improvements to enhance cost-effective efficiencies, and facilitate customer responsiveness. These steps include deploying the ePermitHub Digital Plan Room into the County's Access Portal (Accela Civic Platform), creating a team of in-house development facilitators (project managers) within the Building and Development Review Services (BDRS) Department responsible for managing permits from initial receipt to final approval, and leveraging third party plan review consultants with the breadth of technical proficiency to meet or beat your turnaround review schedule performance metrics.

This web-based permit hub combined with a facilitator staffing (Project Manager) model will streamline the permitting process by providing a single-source main point of contact to deliver concierge-level service while promoting a paperless solution and transparency for 24/7 access to County development services.

### We Listen and Have Solutions

#### Special Consideration: MINIMIZE MULTIPLE REVIEWS

We consistently hear from agencies, applicants, and constituents frustrated at experiencing too many review cycles prior to plan approval, blindsided by new review comments made in subsequent reviews, and lack of plan reviewer assigned continuity for each review. This lack of customer service can be found in lackluster satisfaction surveys, heard at Board meetings from vocal constituents, and experienced by County leadership.

**Our Solution:** HR Green prides itself on efficient and effective customer service. Nationwide, **we consistently experience a 98% success rate meeting our public agency review schedules and approvals within three reviews or less for non-over-the-counter projects.** We do this by:

- ▶ Assigning **the same highly qualified plan reviewer to a project from initial review to final approval.** This creates critical continuity and rapport between the applicant and the reviewer to understand the project's needs, City requirements, and what is required for expeditious and efficient approval.
- ▶ Consistently formalizing and automating the intake and review process (our **GreenTREN** program) whether an electronic or manual submittal. This allows for efficient routing of plans, consistent digital comments, tracking logs, and 24/7 access to project status.

#### PINELLAS COUNTY'S NEEDS AND EXPECTATIONS ALIGNED TO YOUR STRATEGIC PLAN INITIATIVES

- ▶ Cost-effective, responsive service
- ▶ Customer-oriented and qualified staff
- ▶ Stellar and seamless communication
- ▶ Timely reviews
- ▶ Streamlined permit processing
- ▶ Concierge, "Top of Class" service with a "personal touch"
- ▶ Proactive public outreach/education
- ▶ Electronic/ web-based tools
- ▶ Digital comments letters
- ▶ High productivity / Efficient service
- ▶ Accurate and complete record keeping to deliver quality and timely response within budget and schedule

- ▶ Working collaboratively with the designers, contractors, and developers to deliver a team approach through cooperation in delivering the final plans.

#### Special Consideration: EFFECTIVE COMMUNICATION

A lack of effective communication between applicants, county departments, regulatory agencies, and the consultant reviewers can extend the review process, foster frustration, negatively impact relationships, and compound inefficiencies. Applicants may not be informed as to submittal requirements or understand Conditions of Approval, code intent, and Certificate of Occupancy requirements or plan submittal requirements. Consequently, either comments grow after plans have already been resubmitted, causing even more delays, and/or otherwise unnecessary re-inspections are required.

**Our Solution:** HR Green prioritizes seamless communication among all stakeholders. We do this by:

- ▶ Facilitating meetings with stakeholders, applicants, architects, and engineering to help secure plans that meet the project objectives and the requirements of a plan submittal, to the extent possible.
- ▶ Utilizing educational handouts and checklists through various avenues (e.g., County website, emails, at the counter, etc.).

## 2. APPROACH

- ▶ Establishing and sharing key submittal metrics and expectations.
- ▶ Taking advantage of internal plan review checklists and forms tied to your permitting system to provide consistency by HR Green staff.
- ▶ Initially meeting, as necessary, with applicants upon receipt of the submittal to clarify the required steps for project approval, code requirements, alternate construction means and methods, key milestones, and contact information.
- ▶ Holding virtual meetings to review digital/manual comments, explain the rationale for these comments, and real-time collaboration to incorporate changes and corrections.
- ▶ Responding to phone calls and emails within one day.

### **Special Consideration: SUPPORT COUNTY STAFF EFFICIENTLY**

A potential issue could be inadequate coordination with County consultants and applicants. This can best be illustrated when there are cascading concerns of inefficiencies due to myriad of issues that could have been avoided. These issues could include not having sufficient qualified staff available to perform the assigned to plan review, not mobilizing enough qualified staff and/or quickly enough to meet current workloads, assigning staff either not familiar with your agency-specific processes and standards or not possessing the customer-centric skills needed which otherwise creates an adversarial relationship.

**Our Solution:** HR Green's greatest resource is our staff and their availability to support your plan check and permitting workload demands. As an employee-owned firm with a 110 year reputation, we embrace and enrich our technical proficiency and communications skills to become trusted advisors and solution finders in who you can have an extremely high level of confidence. Our client agencies expect us to live our Mission: **BUILDING COMMUNITIES. IMPROVING LIVES.**

Our success is grounded in our collective commitment to our Core Values: **Leadership, Performance, Operational Excellence, Collaboration, and Community.** We do this by:

- ▶ Consistently meeting and communicating with the agency staff to establish goals, understand

expectations, monitor current and future workload, and review staff performance.

- ▶ Verifying that all proposed assigned staff seamlessly mirror the background and needs of the County so they can hit the ground running upon notice to proceed.
- ▶ Familiarizing our staff before deployment with your specific agency needs, codes and standards, documentation, performance expectations, and chain of command.
- ▶ Proactively providing ongoing cross-training and financially supporting staff to obtain professional credentials and other critical skills (public speaking, change management, software proficiency, conflict resolution, etc.).
- ▶ Assigning staff that you will get to know and deliver the services you expect in the most cost-effective manner.
- ▶ Mentoring our services to assure that we are delivering what we promised.
- ▶ Providing proper documentation of plan reviews and our interaction to deliver clear communication and seamless processing of plans.
- ▶ Proactively communicating with stakeholders and utilizing best practices.
- ▶ Assigning a Professional Architect as our overall Project Manager with high-level experience and skills in successful mentorship and management of building staff, thorough knowledge of building department policies and procedures, national code development reputation, and partnership with other County departments and outside agencies.
- ▶ Assigning Permit Technicians to provide remote support associated with intake, routing, and document control, including those tasks outlined in the County's RFP.
- ▶ Leveraging Registered Plan Review Engineers/Architects, Master Code Professionals, and ICC and LEED-certified Plans Examiners for thorough and timely plan review that complies with applicable codes, ordinances, design standards, and regulatory requirements.

### **THOROUGH AND ACCURATE**

"HR Green provides **thorough and accurate review** comments to our development engineers and responds quickly to expedited review requests. Their proficiency to collaborate using digital commenting of plans (electronic plan check) has saved us time and money."

Daniel Wozniak | Project Manager  
Pulte Homes Corporation

# 2. APPROACH

- ▶ Staff members will verify proper documentation of plan reviews and customer inquiries to deliver clear communication and seamless processing in your permitting system.
- ▶ Complete standard building and structural plan reviews within the County's stated requirements. Our plan reviewers will work with designers, developers, and contractors with a proactive code compliance effort to limit the number of reviews. HR Green's Plan Review team is capable of consistently meeting or beating agency-established time frames. Please see Page 43 for our plan review timetable.
- ▶ Review site-civil components including items such as stormwater and drainage management, parking, lighting, landscaping, signage etc.

### EFFICIENT AND EXPEDITIOUS PROCESS

"HR Green's electronic plan check system provides instant file delivery to all responsible parties, making the review process more efficient and expeditious; at a glance history of all data transfers; and instant project deadline tracking and notification."

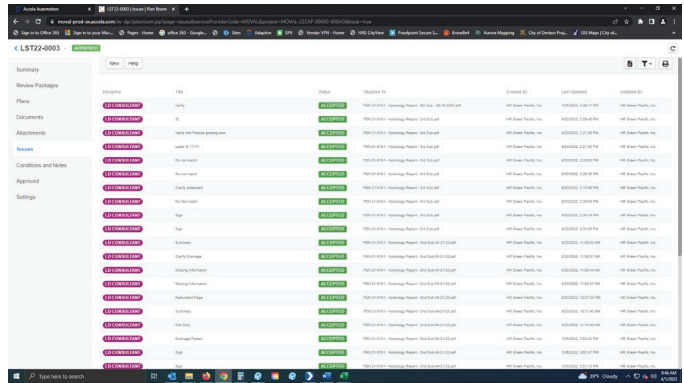
Carmen Barsu, PE, QSD | Public Works Engineering Associate  
City of Pomona, CA

- ▶ Assign qualified HR Green staff who are competent in all plan review disciplines and permit processing who will not only assist with daily duties, but also quickly and effectively respond to natural disasters and emergencies.

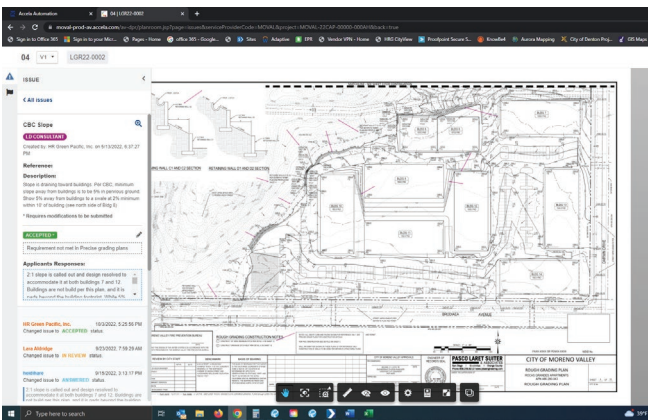
- ▶ Our team will work cohesively with County staff, other departments, stakeholders, business owners, and residents within the communities to facilitate a safe, sustainable, and positive outcome with their applications.

HR Green is ideally suited to accomplish these metrics. We will assign a team of highly qualified plan reviewers and permitting staff (if needed to enhance your processes/ Accela system), all of whom have served either as public agency employees or in an extension of staff role. They will be responsive and flexible, exhibit a high level of customer service, provide timely and cost-effective service, and communicate in a detailed and transparent manner.

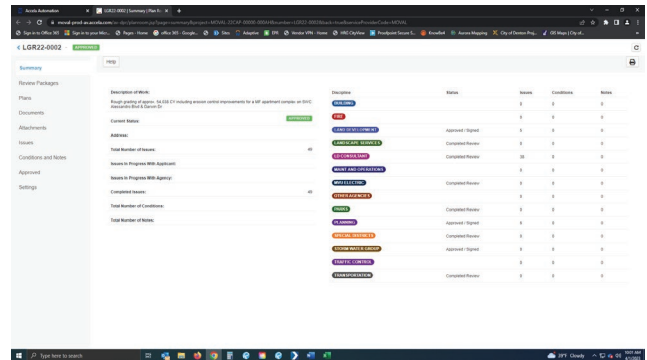
**Our staff will comply with all scope items, duties, and responsibilities detailed in your RFP.**



Sample Digital Plan Room Dashboard



Sample Markup and Digital Comments in Digital Plan Room



Sample Digital Plan Room Review Project Page





## 2. APPROACH

### HR Green's Staffing and Service Delivery Approach

#### **Issue: FIT INTO SPECIFIC MUNICIPAL CULTURE**

**Solution:** Every agency has its own culture, reporting structure, expectations, and goals. Our consultant staff must exhibit utmost professionalism and well-refined interpersonal skillsets to be a team player and seamlessly integrate within your organization while being nimble to respond to changing priorities and emergency situations. Our personnel will carry cellular phones (all staff) for immediate communications and real-time access to your permitting system and paperless/electronic templates, reports, data, logs, etc.

**Note:** Staffing levels and hours will be reviewed with the County so that your needs are met. We also make a commitment to 24/7 access to our staff in the event of responding to emergencies and changing or unforeseen conditions.

#### **Issue: FOLLOW COUNTY PROTOCOLS/PROCESSES**

**Solution:** Our staff will be knowledgeable with applicable codes, amendments, ordinances, design standards, and regulatory requirements. They will be responsible for meeting the performance expectations set forth by the County. Citizens and inter/intra-agency personnel interfacing with HR Green staff must feel they are having the same "transactional business" experience as they would with a County employee.

#### **Issue: FLEXIBILITY/ADAPTABILITY TO RESPOND TO WHATEVER NEEDS ARISE**

**Solution:** Within the municipal arena, there are consistent time sensitive deadlines, emergency issues requiring immediate response, diverse tasks, and potentially changing priorities. Our staff must possess a diverse technical skillset; be nimble, quick, and flexible to embrace change; and possess the ability to effectively transition between such assorted tasks as reviewing plans, analyzing codes and situations to consider appropriateness of alternative materials and methods, writing a staff report, inspecting new construction or improvements, and/or handling permit inquiries.

A successful element of our Alternative Service Delivery philosophy is finding multi-faceted staff who can wear many hats, transition between various roles, and easily transition between different tasks in order to:

- ▶ Maximize utilization and minimize staff levels
- ▶ Maintain service consistency
- ▶ Reduce costs, paper, and storage
- ▶ Maximize a paperless office environment

#### **Issue: MAINTAINING CLEAR & OPEN LINES OF COMMUNICATION**

**Solution:** Maintaining clear and open lines of communication among County staff, permit applicants, developers, engineers, architects, regulatory agencies, and other stakeholders is key to successful program delivery. This includes excellent interpersonal, listening, and problem-solving skills; detailed documentation; insightful progress and staff reports; electronic plan check tools and tracking logs; proficiency of your permitting system; and building consensus to expedite reviews and approvals while mitigating contentious code compliance issues in a spirit of constructive dialogue and harmony.

#### **Innovative/Creative Approaches**

HR Green regularly leverages electronic plan check/digital commenting, permitting database systems, and remote virtual inspections to streamline development review/processing. This can save time for applicants and the County as we utilize this technology to work through building safe and sustainable construction in the County.

#### **EXPERIENCE AND BUSINESS-SENSIBILITY**

"HR Green has successfully performed City Engineering, project support, plan checking, and development reviews for the City since January 2019. The firm brings a **business sensibility** to electronic plan review and engineering management, working closely with our Community Development staff to streamline and assist with the development entitlement process. Further, HR Green is an ideal fit for **combining experience with value** by reducing the amount of paper, time, travel, and costs associated with the plan review process. The use of the virtual cloud promotes real time project tracking."

Christopher Lopez | Former City Manager  
City of Hemet, CA

## 2. APPROACH

### HR Green...At the Forefront of Remote Plan Review and Permitting

HRGreen



For nearly two decades, the HR Green team of reviewers and permit technicians has implemented proven electronic solutions that save time and costs of printing, delivering, handling, and storing copies of plans, documents, and survey records.

Our plan review leaders are industry-recognized thought leaders in advancing the robustness of paperless solutions. Tina and other HR Green professionals have served as technical advisors to paperless data management/reporting software solution providers to incorporate new tools and refine electronic solutions. We leverage and are proficient with various software solutions (e.g., **Accela**, **Digital Plan Room**, Adobe, **Bluebeam Revu**, TRAKIT, EnerGov, Agiline, ePlanSoft, etc.) to not only create a paperless environment, but also provide healthy reporting for smart decision-making. We are constantly implementing the latest tools available in software.

HR Green is dedicated to providing comprehensive, turn-key development review, processing and management services to accelerate processing and approval. This includes blending building plan check, site civil plan check, map check, and telecommunications facilities application review services for cities and counties. Our staff members have worked with cores of agencies nationwide. Key leaders have served as technical advisors to various electronic plan review software providers to enhance the functionality of their systems.

#### PROFESSIONAL AND SOLUTION-ORIENTED

“HR Green staff proved to be very helpful in assisting the property owner address the key concerns city staff and the citizens had with our project impacts. Their **professionalism and the solution oriented**, problem-solving approach made our investment group decide to further increase our Investment capital in the City by moving forward with a second project.”

James M. Kozak | President  
Strategic Land Partners, L.P.

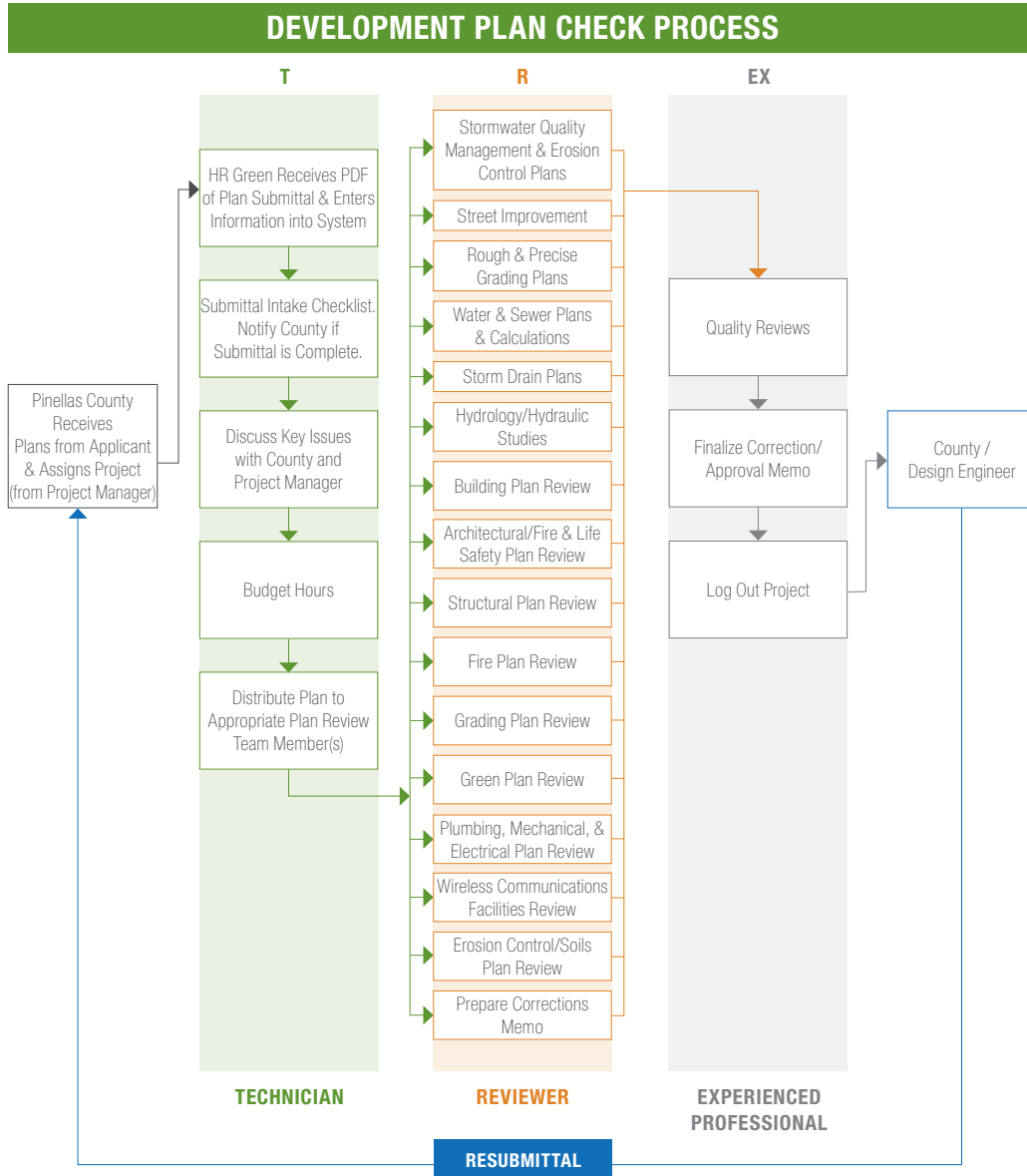
#### Accela Deployment - City of Jurupa Valley, CA

HR Green helped California's newest municipality (incorporated in 2011) with a diverse population of 100,000 transition from County services. One of our key priorities was **creating a streamlined development review process** given the extensive amount of developable land within city limits and City Council desire to foster economic sustainability. **HR Green initially prepared an Operational Review/Assessment that involved multiple departments.** This study identified the implementation of an online/automated permit tracking software as a high priority to improve operational efficiency, transparency and reliability. **In just 13 months, our HR Green staff was able to launch the City's first permit tracking software (Accela interfacing with Agiline CityView 360<sup>o</sup> - a consolidator tool to collect, validate, transform, organize, present and act on information received from several data sources, leading to customized reporting on key performance indicators), enabling Public Works/Engineering, Planning and Building and Safety to directly interface with one another as well as the public, and to create greater efficiency and transparency in the City's operations.** This project required the dedicated effort of all HR Green staff serving the City, including the Project Administrators for the permit software implementation. Our department heads and Permit Technicians, in particular, spent many hours beyond their normal duty assignments in order to test, implement, and deliver this important online permitting and reporting solution to the City. This is a great example of how HR Green takes one of its core values, **Operational Excellence**, to heart, not just for its own operation but for our clients as well. HR Green has also leveraged the use of GIS to manage city assets, code compliance, and maintenance programs, as well as field inspection apps to seamlessly interface paperless reporting through Accela. Our staff members manage all facets of the development planning, review, permitting, and approval process using Accela and an electronic plan check platform, annually reviewing about 1,500+ plan sheets and achieving a 98+% turnaround review success rate.

## 2. APPROACH



HR Green's **GreenTREX** plan review process/program allows us to efficiently complete plan tasks concurrently. This is a formalized and integrated process where **T**echnician data input and processing, **R**eview, and **E**xperienced professional staff manage quality control functions that are consistently implemented on each and every project. This Standard Operating Procedure streamlines the intake, assignment, review, and approval process, promoting collaboration and thorough documentation in a paperless environment. Below is a flowchart of our process which we will follow to meet or beat your plan review turnaround schedule.



## 2. APPROACH

### Distinguishing Features, Skills, and Services

The following elements distinguish HR Green from our competitors:

Our Mission is **BUILDING COMMUNITIES. IMPROVING LIVES.** Since our beginning dating back to 1913, HR Green has done exactly that, serving as a trusted partner to our client communities. Today we serve hundreds of public clients (cities, counties, regional agencies, DOTs) with 670+ dedicated and skilled resources throughout our footprint. Each day, we work to find solutions that inspire our employees, exceed our clients' expectations, and create a lasting legacy in our communities.

We focus on creating staffing and project delivery solutions that address client needs. In Pinellas County's case to address your desires for enhanced efficiencies and reliable technical insight, we will combine a scalable staffing plan with proven best practices to achieve your goals. These skills and services include the following items which have been discussed earlier:

- ▶ Customizing our formalized **GreenTReX** plan check system to streamline the processing, routing, review and approval process
- ▶ Offering scalability and access to our entire in-house, dedicated development processing team (certified building officials, building plan reviewers, civil plan reviewers, map reviewers, wireless telecommunications facilities reviewers, and permit technicians), all of whom have either worked as public agency staff or in a staff augmentation role
- ▶ Leveraging electronic plan review, digital plan review comments, **Accela, Digital Plan Room**, and other web-based solutions to offer a paperless environment that will save time and money, reduce storage needs, enhance collaboration, and offer 24/7 access to project status
- ▶ Enlisting nationwide resources to "extend" the workday across three time zones
- ▶ Deploying our proven track record processing, reviewing, and approving projects for the nation's largest developers around the country

#### HR GREEN DIFFERENTIATORS

- ▶ Proficiency with Accela permitting system and Digital Plan Room
- ▶ Collaborative, solutions-oriented, practical plan review approach
- ▶ All staff members have worked as government employees or as an extension of staff
- ▶ Registered engineers/ architects and certified staff
- ▶ Electronic plan check/ digital commenting expertise
- ▶ Proven track record meeting or beating plan review turnaround schedules
- ▶ 50+ staff dedicated to turnkey development processing
- ▶ No conflict of interest
- ▶ Successful track record processing projects of the nation's largest developers
- ▶ 98% success rate approving projects within three review cycles or less

#### PROACTIVE AND TIMELY PROCESSING

"HR Green has played an instrumental role in coordinating the processing our 225-acre mixed use development. Their understanding of development, management approach and knowledgeable team have resulted in **timely processing** the various aspects of our project while protecting the agency. We are currently working with the HR Green team in various aspects of our development, including engineering plan check. Their staff have been **very proactive** in interacting with our team early in the project concept process to gain planning and entitlement approval. They have provided concierge-level attention with timely and meaningful comments - thereby helping to accelerate approvals and minimize delays."

Matthew Dugally | Principal  
DO Capital Group

## 2. APPROACH

### Our Value-Added Services

LOOKING  
FORWARD



#### STAFF DEVELOPMENT/TRAINING/ COMMUNITY WORKSHOPS

While the success of our work products relies on our team of professionals to deliver exceptional service to the County, we can utilize

them to further assist in many other ways. HR Green can support and provide staff training that will help the County's team grow their potential to better serve your communities. We can also facilitate code training and workshops with developers, applicants, land development engineers and architects. These efforts can include technical training topics, team building exercises, information guides, flowcharts, checklists, and website tools, along with workshops with County constituents to better understand our obligation as code professionals in the built environment and how to streamline the processing and approvals per codes and amendments.

Our **Overall Project/Contract Manager, Frank Urbina, NCARB, AIA, APA ALA, and the HR Green Team** have extensive knowledge in Building Official-related tasks including fee analysis, code adoption, legislative updates, and many other changes that come from enforcing building code regulations. Together, through our partnership with the County, we can leverage our mutual strengths to be able to provide the highest level of customer service and provide the best solutions for how we approach development review services to Pinellas County. This enables the County to elevate and enhance your overall Building and Development Review Services (BDRS) operations and exceed expectations from the communities.

#### RATE STUDIES

Many agencies are faced with managing building and development services associated with outdated fee schedules which place an unnecessary financial and cost of service burden on supporting key departmental responsibilities (plan review, permitting, and inspection) to process and approve projects which otherwise mitigate impacts on public improvements, public services, and community amenities. As we have done for other agencies, should the County so desire HR Green can assess your current building department fees, compared to similar, nearby jurisdictions, and recommend appropriate fees

and allocated percentages/rates that support the full cost recovery of services. Any revised fee program must comply with your Government Code.

#### TELECOM / FIBER REVIEW

HR Green is at the forefront of review and implementation of broadband, fiber optics, small cell, and 5G technology. The September 26, 2018 FCC Small Cell Preemption Order was meant to accelerate small cell and 5G deployment nationally. HR Green has helped 20+ agencies nationally maintain a significant amount of authority and flexibility by negotiating win-win outcomes that benefit carriers while addressing key community concerns, such as aesthetics, availability of high-speed telecommunications, and public safety. This includes, but is not limited to public policy development, design standards development, plan review, permit processing, co-location agreements, and inspection.

#### Telecommunication Reviews - Reliable Practices for the Future Generations

While reviewing the plans, we work expeditiously to address issues of importance and verify the aesthetics, RF requirements, and final product meet your expectations.

#### Completeness of Applications

Incomplete applications are often a problem with submittals for all types of municipal permits, including telecommunications installations. The FCC recognizes this issue within their review timelines, aka, shot clocks. Agencies may "Toll" the shot clock if the application is reviewed and notice is provided within 10 days (per FCC Small Cell Order 18-133 for telecommunications facilities installations) of initial submittal specifically identifying what is incomplete or missing. HR Green seeks to perform the completeness review well within that timeframe. These notices would be sent directly to the applicant with a copy to the County.

#### Shot Clock Review Timeframes

HR Green seeks to process the applications as expeditiously as possible so that the agency's rights are protected. Through the adoption of FCC Small Cell Order (18-133) and other related regulations, the FCC has placed strict timelines on agencies for reviewing telecommunications applications as well as their ability to control what lies within County-owned rights-of-way with little regard for the County's need to protect their single most valuable asset. Without proper oversight, these regulations threaten significant damage to this infrastructure.





# 3. STATEMENT OF WORK

# 3. STATEMENT OF WORK

Once the County provides a notice-to-proceed, our Project Manager and Service Task Leaders will meet with applicable County staff to identify your staffing requirements and establish best practice protocols for your plan review and permitting needs consistent with the standards established by the BDRS Building Official. We will initiate a staff and resource management plan that is appropriate to the nature of your staffing needs, be it a long-term assignment; a specific, complex project; and/or as-needed remote staffing coverage due to vacations, illness, etc.

For a period of 2-3 days assigned HR Green staff will participate in virtual training of Pinellas County processes, including but not limited to the County's Accela platform for both Building and DRS, Digital Plan Room Standard Operating Procedures, remote portal training, VuSpex training and DRS Engineering, and Environmental Site Plan/Building permit Standard Operating Procedures. Upon successful completion of training, HR Green staff members will be working remotely unless as directed by the County. Assignments will be sent via electronic method.

Permit plan reviews will be performed remotely via electronic access within the County's Accela platform by using electronic plan review (Digital Plan Room). Types of reviews include:

- ▶ Commercial and residential reviews
- ▶ Multi-trade plan reviews, including mechanical, electrical, plumbing, and structural

## Building Permit Plan Review

### Step 1 - Preliminary Discussions

Prior to beginning our initial plan check project, our Building Plan Review Task Leader will conduct a meeting or conference call with the County to discuss County and other local jurisdictional code policies, documentation procedures, plan processing protocols, plan review checklist items, and scheduling.

### Step 2 - Initial Review

Once we receive a complete set of plan documents, we will perform our plan review in the prescribed time frame, checking for compliance to all applicable code standards. All corrections are identified based on compliance with

specified codes and regulations and worded so the designer will know what needs attention and how to respond to the issue stated. Corrections will be identified in two ways:

- ▶ Notes made on plans as appropriate and authorized to assist in locating the issue on the plans.
- ▶ A correction sheet detailing what items need to be addressed before plan approval.

You will receive a copy of each correction list, as well as a cover memo containing the following:

- ▶ The date plans were reviewed by our plan review staff
- ▶ The date that the applicant/applicant's designee was notified that the plan review was completed
- ▶ The name and phone number of the applicant/applicant's designee that was notified that the plan review was completed

### Step 3 - Transmittal of Plans and Comment Lists for Plan Check

At the heart of our approach in delivering our services to you is the recognition that there must be a coordinated effort to track and coordinate all submittals and requests received. To help assure that submittals are properly coordinated and tracked, we have established an internal plan check coordination process (**GreenTREx**) in which each plan received for review is properly handled, processed through the Digital Plan Room and returned on time. Upon completion of our review, any comments generated are consolidated into a correction letter which is forwarded to the applicant; at the same time, an electronic copy will be sent to the County for your reference. At your discretion, upon completion of the initial plan review, a debrief between our staff and the County can be coordinated to verify our firm is aligning with your expectations.

### Step 4 - Rechecks

Upon receipt of the resubmittal package from the applicant, we will notify the County that we have received the package. Once we have verified that the resubmittal package is complete, we will perform a recheck in the agreed-upon time frame. This process will be repeated until the project plan documents are ready to be recommended for approval. We will aspire to achieve approval within no more than three reviews.

## 3. STATEMENT OF WORK

### Step 5 - Plan Approval

Upon plan approval, our team will present to you the requested number of approved building plans, a copy of the review sheet with all completed items appropriately signed off, a letter of transmittal stating the conditions, if any, of approval (such as fees due, necessary agency approval(s), or minor items to be completed), and all other pertinent documents.

Our plan tracking procedures are computerized to track each submittal through the review process and maintain accurate and comprehensive records for each submittal.

Our electronic plan review letters are formatted per specialty areas. They also list each plan review sheet to distinguish from plan resubmittals, as well as the date of the plans and all submittal supporting documents. In addition, our review letters all conclude with the name, phone number and email for each plan reviewer listed so that design professionals or permit applicants may contact them with any question(s) pertaining to the review comments or the project in general. For your projects, our goal is to limit the number of plan submittals for rapid permit release and to get to ground-breaking, ribbon-cutting, and, for buildings, a final Certificate of Occupancy to be issued.

### Electronic Plan Review / Tracking of Review Comments

We will track review comments to verify that each comment has been addressed by the design team. This is critical on larger, multi-disciplined projects where there may be overlap between design disciplines. Comments from each review cycle will be summarized electronically by our staff. Design responses shall be added and included with the next submittal to verify that all comments have been addressed. This approach has been effective in resolving comments at early stages, avoiding repeat comments by reviewers, and coordinating responses among disciplines. Our goal on more complex projects is to achieve approvals within no more than three reviews.

### Plan Review Tracking Log

A key to maintain close communication is the ability to give the stakeholders status updates on where their projects are in the review process. One tool our QA/QC experts have developed and used successfully for various cities is a tracking log. This will be customized according to your needs.

### Development/Updating of Policies & Procedures

We will provide/enforce the latest adopted building codes. Should the County so desire, we can update ordinances design standards, procedures, and your technical review checklists customized to applicable design standards and the current codes for improvements, special provisions and cost estimates. The checklists incorporate lessons learned from past projects into future projects and are an effective tool for maintaining consistency and conformance during the submittal review process.

### Remote Permitting Services

Our permit technicians will work remotely, leveraging the County's Accela and Digital Plan Room platform to provide support services associated with permit completeness, fee formulation, certificate of occupancy issuance and related services. These services will include the review of private provider filings. Our staff will be available during the County's hours of operation.

- ▶ **Regular business hours:** Monday - Friday, 7:30 AM-4:30 PM
- ▶ **Weekends:** Saturday and Sunday (only if authorized by the County)
- ▶ **Holidays:** County holidays as designated on the County's official calendar (only if authorized by the County)



## 3. STATEMENT OF WORK

### DRS Site Plan Engineering & Site Plan Services

#### Step 1 - Preliminary Discussions

Prior to beginning our initial plan check project, our Site Plan Engineering Review Task Leader and Permit Technician will review the submittal for completeness and area of design concern. If necessary, we will conduct a meeting or conference call with the applicant and/or County to discuss the concerns, code policies, documentation procedures, plan processing protocols, plan review checklist items, and scheduling.

#### Step 2 – Initial Review

Once HR Green receives a complete set of plan documents, we will perform our plan review electronically in the agreed-upon time frame, checking for compliance to all applicable codes and standards. At your discretion, upon completion of the initial plan review a debrief between our staff and the County can be coordinated so that our firm is aligning with the County's expectations. Marked up plans, the corrections memo, and a transmittal will be sent electronically to the County, engineer of work, and developer.

#### Step 3 - Rechecks

Upon receipt of the resubmittal package from the applicant, we will verify that the resubmittal package is complete. We will assign the package to the same reviewer who provided the prior review and perform a recheck in the agreed-upon timeframe. This process will be repeated until the project plan documents are ready to be recommended for approval. As part of our review process, we verify quantities and the engineer's cost estimate.

#### Step 4 – Plan Approval

Once all comments have been addressed, HR Green will request the mylars which will receive a final review by the Plan Review Task Leader who will initial when complete. The mylars will be transmitted to the County with a letter recommending approval and assert the final product is in substantial conformance with applicable local, county, state, and federal requirements.

# 3. STATEMENT OF WORK

## MEETING / BEATING YOUR BUILDING PLAN REVIEW TURNAROUND EXPECTATIONS

Our plan review will be handled through your paperless electronic plan check/digital commenting process to the maximum extent possible. Through HR Green’s extensive experience with plan check services and our own in-house process, our staff shall consistently meet or beat your service level goals in the performance of our plan check work as laid out below:

Electronic Plan Review Service Level Commitments					
	Building Division Plan Reviews		DRS Site Plan Engineering & Site Plan Services		
Review Cycle	Residential	Commercial	Site Plan (Simple)	Site Plan (Complex)	Right-of-Way Utilization Permits
Pinellas County (1st Review)	3 business days	5 business days	5-8 business days	10-15 business days	8 business days
HR Green (1st Review)	3-5 business days	5-7 business days	5-8 business days	10-15 business days	8 business days
Pinellas County (2nd Review)	2 business days	3 business days	5 business days	10 business days	5 business days
HR Green (2nd Review)	2-3 business days	3-5 business days	5 business days	10 business days	5 business days
Pinellas County (3rd Review)	2 business days	2 business days	5 business days	7 business days	
HR Green (3rd Review)	2-3 business days	2-4 business days	5 business days	7 business days	

**Please note, once we have a better understanding of the volume of permit activity, we could revisit the turn around times shown above.**

At the conclusion of each development review, our reviewer digitally stamps (signs hard copies) the title sheet of the redlined document or the cover page on reports with the date, reviewer’s initials, and submittal number. The redlines, a comprehensive comment letter, and checklist are provided to all stakeholders. All documents are turned around on-time or ahead of schedule. HR Green earnestly seeks to meet or beat your expectations. We are able to meet the most hard-hitting schedules with a near perfect track record.

### PLAN REVIEW TURNAROUND NOTES:

1. Turnaround times depend on the complexity of the project.
2. Our plan review process will provide for an initial plan review, and two additional re-checks under the plan review fees paid at the time of plan review submittal (three plan review rounds total).
3. Large scale and complex commercial/industrial projects may take up to 20 business days for first review based upon their complexity. These include, but are not limited to, high rise buildings, multi-story mixed use, and projects with multiple buildings exceeding 25,000 sf. or larger.

Our staff is knowledgeable and proficient using the Accela permitting and Digital Plan Room systems, and will provide updates and status reports as desired by the County. We will work closely with applicants so that projects will not go through useless rounds of corrections or comments. We pride our ourselves on a work product that can effectively and efficiently deliver the highest quality plan review while partnering with designers, developers, contractors, and others in order to work through any code deficiencies that enables a prompt turnaround of approved plans.

# 3. STATEMENT OF WORK

## As-Needed Services

HR Green shall provide the following services:

- ▶ Site plan, Right-of-Way Use Permit, subdivision plats, waivers and similar documents review assistance regarding transportation, stormwater, floodplain management, and the Land Development Code (LDC).
- ▶ Participation in permitting meetings virtually with County staff. Conversations with third-party consultants and engineers will be coordinated through County Development Review Services (DRS) staff (to be included in each site plan review fee).
- ▶ Participation in public and other meetings as subject matter experts on behalf of the County with prior approval from DRS staff (to be performed on an hourly basis).
- ▶ If required, HR Green will prepare presentations and present the results to County management, stakeholders, or the Board of County Commissioners (BCC) (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with transportation, flooding, drainage, and related complaint investigations (to be performed on an hourly basis).
- ▶ Meeting summaries on transportation and stormwater aspects of projects will be provided within five (5) business days of the meeting.
- ▶ Technical summaries and permit and waiver reviews will be submitted in accordance with the County's review timelines (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with interpreting or peer reviewing transportation, flood and drainage related designs, models, and other engineering documents (to be performed on an hourly basis).
- ▶ Technical and engineering assistance with variance requests (to be performed on an hourly basis).
- ▶ Prepare review comment letters (to be included in each site plan review fee).
- ▶ Attend Development Review Committee (DRC) meetings virtually (to be included in each site plan review fee).

## Deliverables

Technical, reviews, technical recommendations, and site visit summaries will be provided electronically as brief technical memos, emails, or PDF markups, as appropriate.

## Assumptions & Exclusions/Limitations

- ▶ All documents (e.g., surveys, plans, calculations, models, GIS data, reports, and other relevant data) necessary to complete reviews shall be provided in a timely manner by the County.
- ▶ Site Plan, Right of Way Use Permit, subdivision plats, and waiver reviews generated by HR Green will be entered by the County into Accela or other tracking software. Such software licenses, if required, will be provided by the County at the County's expense.
- ▶ Meetings will be scheduled and coordinated by the County. HR Green shall provide adequate notice of availability to attend meetings. In cases where calendar conflicts cannot be resolved HR Green shall send a qualified representative to the meeting.
- ▶ Plat reviews are not included.