



## **CITY OF ATASCADERO CITY COUNCIL AGENDA**

### **HYBRID MEETING INFORMATION:**

In accordance with City Council Resolution No. 2022-006 and the requirements of AB 361, the City Council Meeting will be available via teleconference for those who wish to participate remotely. The City Council meeting will also be held in the City Council Chambers and in-person attendance will be available at that location.

### **HOW TO OBSERVE THE MEETING REMOTELY:**

To participate remotely, residents can livestream the meeting on [Zoom](#), SLO-SPAN.org, on Spectrum cable Channel 20 in Atascadero, and listen live on KPRL Radio 1230AM and 99.3FM. The video recording of the meeting will repeat daily on Channel 20 at 1:00 am, 9:00 am, and 6:00 pm and will be available through the City's website and on the City's YouTube Channel. To participate remotely using the Zoom platform please visit [https://us02web.zoom.us/webinar/register/WN\\_ZwJ7a031S3KXauEym9ehaA](https://us02web.zoom.us/webinar/register/WN_ZwJ7a031S3KXauEym9ehaA).

### **HOW TO SUBMIT PUBLIC COMMENT:**

Individuals who wish to provide public comment in-person may attend the meeting in the City Council Chambers. Individuals who wish to provide public comment remotely may call **805-538-2888** to listen and provide public comment via phone, or participate in live public comment through the [Zoom](#) platform using the link above.

If you wish to comment but not via a live platform, please email public comments to [cityclerk@atascadero.org](mailto:cityclerk@atascadero.org) by 12:00 pm on the day of the meeting. Such email **comments must identify the Agenda Item Number in the subject line of the email**. The comments will be forwarded to the City Council and made a part of the administrative record. If a comment is received after the deadline for submission but before the close of the meeting, the comment will still be included as a part of the administrative record of the meeting but will be forwarded to the City Council the next business day. ***Please note, email comments will not be read into the record.***

### **AMERICAN DISABILITY ACT ACCOMMODATIONS:**

Any member of the public who needs accommodations should contact the City Clerk's Office at [cityclerk@atascadero.org](mailto:cityclerk@atascadero.org) or by calling 805-470-3400 at least 48 hours prior to the meeting or time when services are needed. The City will use their best efforts to provide reasonable accommodations to afford as much accessibility as possible while also maintaining public safety in accordance with the City procedure for resolving reasonable accommodation requests.

City Council agendas and minutes may be viewed on the City's website: [www.atascadero.org](http://www.atascadero.org).

Copies of the staff reports or other documentation relating to each item of business referred to on the Agenda are on file in the office of the City Clerk and are available for public inspection on our website, [www.atascadero.org](http://www.atascadero.org). Contracts, Resolutions and Ordinances will be allocated a number once they are approved by the City Council. The Minutes of this meeting will reflect these numbers. All documents submitted by the public during Council meetings that are made a part of the record or referred to in their statement will be noted in the Minutes and available for review by contacting the City Clerk's office. All documents will be available for public inspection by appointment during City Hall business hours.



# **CITY OF ATASCADERO CITY COUNCIL**

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## **AGENDA**

**Tuesday, March 22, 2022**

**City Hall Council Chambers, 4th floor  
6500 Palma Avenue, Atascadero, California**

**City Council Regular Session:**

**6:00 P.M.**

**City Council Closed Session:**

**Immediately following  
Regular Session**

**REGULAR SESSION – CALL TO ORDER: 6:00 P.M.**

**PLEDGE OF ALLEGIANCE:** Council Member Bourbeau

**ROLL CALL:**  
Mayor Moreno  
Mayor Pro Tem Newsom  
Council Member Bourbeau  
Council Member Dariz  
Council Member Funk

**APPROVAL OF AGENDA:** Roll Call

**Recommendation:** Council:

1. Approve this agenda; and
2. Waive the reading in full of all ordinances appearing on this agenda, and the titles of the ordinances will be read aloud by the City Clerk at the first reading, after the motion and before the City Council votes.

### **CLOSED SESSION – REPORT (IF ANY)**

Announcement(s) of any reportable action(s) taken in Closed Session that occur(s) after the adjournment of Regular Session will be made at the beginning of the next Regular City Council meeting as Closed Session is not recorded or videotaped.

**PRESENTATIONS: None.**

**A. CONSENT CALENDAR:** (All items on the consent calendar are considered to be routine and non-controversial by City staff and will be approved by one motion if no member of the Council or public wishes to comment or ask questions. If comment or discussion is desired by anyone, the item will be removed from the Consent Calendar and will be considered in the listed sequence with an opportunity for any member of the public to address the Council concerning the item before action is taken.)

**1. City Council Draft Action Minutes – March 8, 2022**

- Recommendation: Council approve the March 8, 2022 Draft City Council Regular Meeting Minutes. [City Clerk]

**2. February 2022 Accounts Payable and Payroll**

- Fiscal Impact: \$2,908,710.76
- Recommendation: Council approve certified City accounts payable, payroll and payroll vendor checks for February 2022. [Administrative Services]

**3. December 2021 Investment Report**

- Fiscal Impact: None.
- Recommendation: Council receive and file the City Treasurer's report for quarter ending December 31, 2021. [City Treasurer]

**4. SB 1383 – MWEL0 and CALGreen Requirements**

- Fiscal Impact: None.
- Recommendation: Council adopt, on second reading, a Draft Ordinance amending Title 8, (Building Code) Chapter 8 and Chapter 10 of the Atascadero Municipal Code, to implement CALGreen requirements for covered projects and to establish water efficient landscape and irrigation requirements in compliance with Senate Bill 1383. [City Manager]

**5. Approve Parcel Map AT 20-0013**

- Fiscal Impact: None.
- Recommendation: Council adopt Draft Resolution approving Parcel Map AT 20-0013 and accept an offer of street and public utility easement on behalf of the public, and order the summary vacation of an unbuilt portion of Ramona Road right-of-way. [Public Works]

**UPDATES FROM THE CITY MANAGER:** (The City Manager will give an oral report on any current issues of concern to the City Council.)

**COMMUNITY FORUM:** (This portion of the meeting is reserved for persons wanting to address the Council on any matter not on this agenda and over which the Council has jurisdiction. Speakers are limited to three minutes. Please state your name for the record before making your presentation. Comments made during Community Forum will not be a subject of discussion. A maximum of 30 minutes will be allowed for Community Forum, unless changed by the Council. Comments will be allowed for the entire 30-minute period so if the final speaker has finished before the 30 minute period has ended and a member of the public wishes to make a comment after the Council has commenced another item, the member should alert the Clerk within the 30 minute period of their desire to make a comment and the Council will take up that comment upon completion of the item which was commenced. Any members of the public who have questions or need information may contact the City Clerk's Office, between the hours of 8:30 a.m. and 5:00 p.m. at (805) 470-3400, or [cityclerk@atascadero.org](mailto:cityclerk@atascadero.org).)

**B. PUBLIC HEARINGS: None.**

**C. MANAGEMENT REPORTS:**

**1. Contract Award - General Plan Update Project – Phase 2-6 Contract (GPA21-0067)**

- Fiscal Impact: Authorization to approve the scope and cost of Phases 2-6 of MIG contract for the preparation of the Atascadero General Plan Update will result in the base expenditure of \$1,072,257 of general funds.
- Recommendations: Council:
  1. Council authorize the City Manager to amend the contract with MIG, Inc., adding the scope of Phases 2-6 of the preparation of the Atascadero General Plan Update at a cost of \$1,072,257 bringing the total contract cost to \$1,115,273.
  2. Authorize the Director of Administrative Services to appropriate an additional \$141,800 in general fund reserves for the General Plan Update. [Community Development]

**2. SB 1383 – Recovered Organic Waste Products Procurement Requirements**

- Fiscal Impact: The fiscal impact is currently unknown but is estimated to be significant. The estimated cost for procurement of recovered organic waste product(s) is between \$34,400 and \$213,300.
- Recommendation: Council adopt a Draft Resolution amending the Purchasing Policy to add Section X, creating a new policy and procedures for the purchase of recovered organic waste products as required by Senate Bill 1383. [City Manager]

**3. General Plan & Housing Element Annual Progress Report 2021 (CPP 22-0031)**

- Fiscal Impact: None.
- Recommendation: Council review and accept the Annual General Plan and Housing Element Progress Reports for 2021. [Community Development]

**D. COUNCIL ANNOUNCEMENTS AND COMMITTEE REPORTS:** (On their own initiative, Council Members may make a brief announcement or a brief report on their own activities. The following represent standing committees. Informative status reports will be given, as felt necessary):

Mayor Moreno

1. City Selection Committee
2. County Mayors Round Table
3. Regional Economic Action Coalition (REACH)
4. SLO Council of Governments (SLOCOG)
5. SLO Regional Transit Authority (RTA)

Mayor Pro Tem Newsom

1. City / Schools Committee
2. Design Review Committee
3. League of California Cities – Council Liaison
4. Visit SLO CAL Advisory Committee

Council Member Bourbeau

1. City of Atascadero Finance Committee
2. City / Schools Committee
3. Integrated Waste Management Authority (IWMA)
4. SLO County Water Resources Advisory Committee (WRAC)

Council Member Dariz

1. Air Pollution Control District
2. California Joint Powers Insurance Authority (CJPIA) Board
3. City of Atascadero Finance Committee

Council Member Funk

1. Atascadero Basin Ground Water Sustainability Agency (GSA)
2. Design Review Committee
3. Homeless Services Oversight Council

**E. INDIVIDUAL DETERMINATION AND / OR ACTION:** (Council Members may ask a question for clarification, make a referral to staff or take action to have staff place a matter of business on a future agenda. The Council may take action on items listed on the Agenda.)

1. City Council
2. City Clerk
3. City Treasurer
4. City Attorney
5. City Manager

**F. RECESS REGULAR MEETING TO CLOSED SESSION**

**1. CLOSED SESSION -- PUBLIC COMMENT**

**2. COUNCIL LEAVES TO BEGIN CLOSED SESSION**

**3. CLOSED SESSION – CALL TO ORDER**

**a. Conference with Real Property Negotiators** (Govt. Code 54956.8)

Real Property: 6009 Del Rio Road (APN 049141038 – City Property), 2000 Ramona Road (APN 049141039 – City Property), 6105 Olmeda Avenue (APN 029091001 – State of California Property), Atascadero, California, 93422

Agency Negotiator: Rachelle Rickard, City Manager

Subject of Negotiations: Purchase price and/or terms of payment

**4. CLOSED SESSION – ADJOURNMENT**

**Please note:** Should anyone challenge any proposed development entitlement listed on this Agenda in court, that person may be limited to raising those issues addressed at the public hearing described in this notice, or in written correspondence delivered to the City Council at or prior to this public hearing. Correspondence submitted at this public hearing will be distributed to the Council and available for review in the City Clerk's office.



# CITY OF ATASCADERO CITY COUNCIL

## DRAFT MINUTES

Tuesday, March 8, 2022

City Hall Council Chambers, 4th floor  
6500 Palma Avenue, Atascadero, California

<b><u>City Council Closed Session:</u></b>	<b>5:00 P.M.</b>
<b><u>City Council Regular Session:</u></b>	<b>6:00 P.M.</b>

### COUNCIL CLOSED SESSION – CALL TO ORDER: 5:00 P.M.

Mayor Moreno called Closed Session to order at 5:03 p.m.

#### 1. ROLL CALL

Present: Council Members Bourbeau, Dariz (by teleconference), Funk, Mayor Pro Tem Newsom and Mayor Moreno

Others Present: None

Staff Present: City Manager Rachelle Rickard, City Attorney Brian Pierik, Deputy City Manager/City Clerk Lara Christensen, and IT Manager Luke Knight

#### 2. CLOSED SESSION -- PUBLIC COMMENT – None

#### 3. COUNCIL RECESS INTO CLOSED SESSION

IT Manager Knight did not attend this portion of the meeting.

#### 4. CLOSED SESSION

##### a. Conference with Legal – Anticipated Litigation

Significant exposure to litigation pursuant to Government Code Section 54956.9(d)(2): 1 potential case – California Voting Rights Act

#### 5. CLOSED SESSION – ADJOURNMENT

## 6. COUNCIL RETURNS

### REGULAR SESSION – CALL TO ORDER: 6:00 P.M.

Mayor Moreno called the meeting to order at 6:03 p.m. and Council Member Funk led the Pledge of Allegiance.

#### ROLL CALL:

Present: Council Members Bourbeau, Dariz (by teleconference) and Funk, and Mayor Pro Tem Newsom

Absent: None

Others Present: None

Staff Present: City Manager Rachelle Rickard, Administrative Services Director Jeri Rangel, Community Development Director Phil Dunsmore, Fire Chief Casey Bryson, Police Chief Bob Masterson, Public Works Director Nick DeBar, City Attorney Brian Pierik, Deputy City Manager/City Clerk Lara Christensen, Public Works Analyst Ryan Betz, and IT Manager Luke Knight

#### APPROVAL OF AGENDA:

**MOTION:** By Council Member Bourbeau and seconded by Mayor Pro Tem Newsom to:

1. Approve this agenda; and,
2. Waive the reading in full of all ordinances appearing on this agenda, and the titles of the ordinances will be read aloud by the City Clerk at the first reading, after the motion and before the City Council votes.

*Motion passed 5:0 by a roll-call vote.*

#### CLOSED SESSION – REPORT (IF ANY)

City Attorney Pierik reported that there was no reportable action from Closed Session.

**PRESENTATIONS:** None.

#### A. CONSENT CALENDAR:

##### 1. City Council Draft Action Minutes – February 22, 2022

- Recommendation: Council approve the February 22, 2022 Draft City Council Regular Meeting Minutes. [City Clerk]

**2. SB 1383 – New Solid Waste Requirements**

- Fiscal Impact: None. SB 1383 Regulations call for multiple changes to collection, monitoring, education, purchasing, and reporting that will lead to an increase to the City's solid waste rates.
- Recommendation: Council adopt, on second reading, by title only, a Draft Ordinance amending Title 6, Chapter 4 (Solid Waste Collection) in its entirety in conformity with Assembly Bills 939, 341, 1826, and Senate Bill 1383. [City Manager]

**3. Budget Amendment to Advance Funding for Street and Storm Drain Maintenance District No. 2 (Las Lomas) Pavement Management**

- Fiscal Impact: None.
- Recommendation: Council authorize the Director of Administrative Services to amend the current Fiscal Years 2021-2023 Budget to advance \$374,000 from Fiscal Year 2022/2023 to Fiscal Year 2021/2022 for Street and Storm Drain Maintenance District No. 2 (Las Lomas) Pavement Management. [Public Works]

**4. Disposal of Assets – Fire Radios**

- Fiscal Impact: Authorizing the donation of 8 radios to Templeton Fire Department and 12 radios to Morro Bay Fire Department will not incur any new expenses. However, disposal of the radios through donation versus sales has a book value loss of about \$13,000.
- Recommendation: Council authorize the Fire Chief to allocate surplus used hand-held radios to Templeton Fire Department and Morro Bay Fire Department. [Fire Department]

**MOTION: By Council Member Bourbeau and seconded by Council Member Funk to approve the Consent Calendar. (#A-2: Ordinance No. 653)  
*Motion passed 5:0 by a roll-call vote.***

**UPDATES FROM THE CITY MANAGER:**

City Manager Rickard gave an update on projects and events within the City.

**COMMUNITY FORUM:**

The following citizens spoke in-person, by telephone or through the webinar: Wendy Lewis

**B. PUBLIC HEARINGS:**

**1. 2022 Community Development Block Grant Funding Recommendations**

- Fiscal Impact: Approval of Atascadero's total 2022 CDBG allocation would result in the estimated revenue and expenditure of \$139,465 of CDBG funds.
- Recommendation: Council review and approve funding recommendations for the 2022 Community Development Block Grant (CDBG) program, as detailed in the staff report, and authorize staff to adjust final award amounts proportionately upon receipt of the final funding amount. [Public Works]

Ex Parte Communications

Council Member Funk reported speaking with directors of all the homeless services agencies. Council Member Bourbeau and Mayor Moreno reported speaking with Wendy Lewis. No other Council Members had anything to report.

Public Works Director DeBar gave the report and answered questions from the Council.

**PUBLIC COMMENT:**

The following citizens spoke in-person, by telephone or through the webinar on this item: Geoff Auslen and Wendy Lewis

***Mayor Moreno closed the Public Comment period.***

**MOTION:** By Council Member Funk and seconded by Mayor Pro Tem Newsom to approve funding recommendations for the 2022 Community Development Block Grant (CDBG) program, as detailed in the staff report, and authorize staff to adjust final award amounts where any additional Public Facility funds will be allocated to the City's Santa Rosa project and any additional Public Services funds will be allocated to ECHO and any reduction would be prorated proportionally upon receipt of the final funding amount.

***Motion passed 5:0 by a roll-call vote.***

**2. SB 1383 – MWEL0 and CALGreen Requirements**

- Fiscal Impact: None.
- Recommendation: Council introduce for first reading, by title only, a Draft Ordinance amending Title 8, (Building Code) Chapter 8 and Chapter 10 of the Atascadero Municipal Code, to implement CALGreen requirements for covered projects and Chapter 10 to establish water efficient landscape and irrigation requirements in compliance with Senate Bill 1383. [City Manager]

Ex Parte Communications

No Council Members had anything to report.

*Mayor Moreno recessed the meeting at 6:34 p.m.*

*Mayor Moreno reconvened the meeting at 6:37 p.m. with all present.*

Deputy City Manager Christensen gave the report and answered questions from the Council.

**PUBLIC COMMENT:**

The following citizens spoke in-person, by telephone or through the webinar: None

***Mayor Moreno closed the Public Comment period.***

**MOTION:** By Council Member Funk and seconded by Council Member Bourbeau to introduce for first reading, by title only, a Draft Ordinance amending Title 8, (Building Code) Chapter 8 and Chapter 10 of the Atascadero

**Municipal Code, to implement CALGreen requirements for covered projects (Chapter 8) and to establish water efficient landscape and irrigation requirements (Chapter 10) in compliance with Senate Bill 1383.**

Deputy City Manager/City Clerk Christensen read the title of the Ordinance:

**AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, AMENDING TITLE 8, CHAPTERS 8 (GREEN BUILDING CODE) AND 10 (WATER EFFICIENT LANDSCAPE AND IRRIGATION), OF THE ATASCADERO MUNICIPAL CODE ADDING SECTIONS 8-8.102 (CALGREEN RECYCLING REQUIREMENTS) AND 8-10.103 (WATER EFFICIENT LANDSCAPE AND IRRIGATION REQUIREMENTS) REQUIRING COMPLIANCE WITH SPECIFIC SECTIONS OF THE CALIFORNIA GREEN BUILDING CODE AND STATE MODEL WATER EFFICIENT LANDSCAPE AS REQUIRED BY SENATE BILL 1383**

*Motion passed 5:0 by a roll-call vote.*

**C. MANAGEMENT REPORTS:**

**1. Proposed Sewer Service Rate Increase**

- Fiscal Impact: Administering the Proposition 218 process will cost approximately \$5,000. If approved the rate increase will generate an estimated \$650,000 in additional sewer service charge revenue.
- Recommendations: Council:
  1. Direct staff to administer the Proposition 218 majority protest process and send out notice of the proposed increases to all property owners connected to the municipal sanitary sewer system.
  2. Set a Public Hearing on May 10, 2022 for the City Council's consideration of the proposed wastewater rate increases. [Public Works]

Public Works Director DeBar gave the report and answered questions from the Council.

**PUBLIC COMMENT:**

The following citizens spoke in-person, by telephone or through the webinar: Geoff Auslen

***Mayor Moreno closed the Public Comment period.***

**MOTION: By Council Member Bourbeau and seconded by Mayor Pro Tem Newsom to:**

- 1. Direct staff to administer the Proposition 218 majority protest process and send out notice of the proposed increases to all property owners connected to the municipal sanitary sewer system.**
- 2. Set a Public Hearing on May 10, 2022 for the City Council's consideration of the proposed wastewater rate increases.**

***Motion passed 5:0 by a roll-call vote.***

**2. Virtual Meetings – AB 361 Requirements**

- Fiscal Impact: None.
- Recommendations: Council adopt Draft Resolution making findings consistent with the requirements of AB 361 to continue to allow for the conduct of virtual meetings. [City Manager]

Deputy City Manager Christensen gave the report and answered questions from the Council.

**PUBLIC COMMENT:**

The following citizens spoke in-person, by telephone or through the webinar: Ryan Burmaster

***Mayor Moreno closed the Public Comment period.***

**MOTION: By Mayor Pro Tem Newsom and seconded by Council Member Funk to adopt Resolution No. 2022-006 making findings consistent with the requirements of AB 361 to continue to allow for the conduct of virtual meetings.  
*Motion passed 5:0 by a roll-call vote.***

**D. COUNCIL ANNOUNCEMENTS AND COMMITTEE REPORTS:**

The following Council Members gave brief update reports on their committees since their last Council meeting:

Mayor Moreno

1. Regional Economic Action Coalition (REACH)
2. SLO Regional Transit Authority (RTA)

Mayor Pro Tem Newsom

1. City / Schools Committee
2. Design Review Committee

Council Member Bourbeau

1. Integrated Waste Management Authority (IWMA)

Council Member Funk

1. Atascadero Basin Ground Water Sustainability Agency (GSA)
2. Design Review Committee
3. Homeless Services Oversight Council

**E. INDIVIDUAL DETERMINATION AND / OR ACTION:**

1. Mayor Moreno reported that the Mayors countywide were working together on a statement in support of Ukraine. She noted that this would be a Resolution by the countywide Mayors, not a City of Atascadero Resolution.

**F. ADJOURN**

Mayor Moreno adjourned the meeting at 7:35 pm.

**MINUTES PREPARED BY:**

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Lara K. Christensen  
City Clerk

**APPROVED:**



**Atascadero City Council**  
**Staff Report - Administrative Services Department**

**February 2022 Accounts Payable and Payroll**

**RECOMMENDATION:**

Council approve certified City accounts payable, payroll and payroll vendor checks for February 2022.

**DISCUSSION:**

Attached for City Council review and approval are the following:

**Payroll**

Dated	2/3/22	Checks # 35357 - 35368	\$	11,344.40
		Direct Deposits		325,618.89
Dated	2/17/22	Checks # 35369 - 35381		12,961.68
		Direct Deposits		328,309.95

**Accounts Payable**

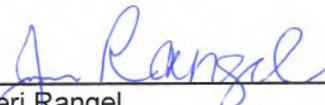
Dated	2/1/22-2/28/22	Checks # 170062 - 170327 & EFTs 4303 - 4329		2,230,475.84
<b>TOTAL AMOUNT</b>				<b>\$ 2,908,710.76</b>

**FISCAL IMPACT:**

Total expenditures for all funds is \$ 2,908,710.76

**CERTIFICATION:**

The undersigned certifies that the attached demands have been released for payment and that funds are available for these demands.

  
 \_\_\_\_\_  
 Jeri Rangel  
 Director of Administrative Services

**ATTACHMENT:**

February 2022 Eden Warrant Register in the amount of \$ 2,230,475.84

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
DATE: 03/22/22  
ATTACHMENT: 1

Check Number	Check Date	Vendor	Description	Amount
4303	02/03/2022	ANTHEM BLUE CROSS HSA	Payroll Vendor Payment	10,215.29
170062	02/03/2022	ATASCADERO MID MGRS ORG UNION	Payroll Vendor Payment	60.00
170063	02/03/2022	ATASCADERO POLICE OFFICERS	Payroll Vendor Payment	1,845.75
170064	02/03/2022	ATASCADERO PROF. FIREFIGHTERS	Payroll Vendor Payment	1,096.80
170065	02/03/2022	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	100.00
170066	02/03/2022	MASS MUTUAL WORKPLACE SOLUTION	Payroll Vendor Payment	7,180.99
170067	02/03/2022	NATIONWIDE RETIREMENT SOLUTION	Payroll Vendor Payment	714.26
170068	02/03/2022	NAVIA BENEFIT SOLUTIONS	Payroll Vendor Payment	1,674.10
170069	02/03/2022	SEIU LOCAL 620	Payroll Vendor Payment	815.54
170070	02/03/2022	VANTAGEPOINT TRNSFR AGT 106099	Payroll Vendor Payment	416.88
170071	02/03/2022	VANTAGEPOINT TRNSFR AGT 304633	Payroll Vendor Payment	7,488.15
170072	02/03/2022	VANTAGEPOINT TRNSFR AGT 706276	Payroll Vendor Payment	685.00
4304	02/04/2022	STATE DISBURSEMENT UNIT	Payroll Vendor Payment	467.07
4305	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	21,932.50
4306	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	32,754.77
4307	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,098.54
4308	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,650.48
4309	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	6,709.33
4310	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	8,234.44
4311	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	9,701.44
4312	02/04/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	15,727.91
4313	02/08/2022	RABOBANK, N.A.	Payroll Vendor Payment	54,048.55
4314	02/08/2022	EMPLOYMENT DEV DEPARTMENT	Payroll Vendor Payment	16,839.23
4315	02/08/2022	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	2,086.02
170073	02/08/2022	WEX BANK - 76 UNIVERSL	Accounts Payable Check	11,782.83
170074	02/08/2022	WEX BANK - WEX FLEET UNIVERSAL	Accounts Payable Check	7,999.83
170075	02/08/2022	ANTHEM BLUE CROSS HEALTH	Payroll Vendor Payment	220,213.15
170076	02/08/2022	LINCOLN NATIONAL LIFE INS CO	Payroll Vendor Payment	2,037.37
170077	02/08/2022	MEDICAL EYE SERVICES	Payroll Vendor Payment	1,876.85
170078	02/11/2022	13 STARS MEDIA	Accounts Payable Check	314.61
170079	02/11/2022	2 MEXICANS, LLC	Accounts Payable Check	1,730.00
170080	02/11/2022	AGP VIDEO, INC.	Accounts Payable Check	2,350.00
170081	02/11/2022	AIR VOL BLOCK, INC.	Accounts Payable Check	443.27
170082	02/11/2022	ALL SIGNS AND GRAPHICS, INC.	Accounts Payable Check	261.00
170083	02/11/2022	ALLIANT INSURANCE SERVICES INC	Accounts Payable Check	182.00
170084	02/11/2022	ALLSTAR FIRE EQUIPMENT, INC.	Accounts Payable Check	836.29
170085	02/11/2022	AMERICAN WEST TIRE & AUTO INC	Accounts Payable Check	1,220.77
170086	02/11/2022	DREW T. ARDOUIN	Accounts Payable Check	72.00
170087	02/11/2022	ASCAP	Accounts Payable Check	390.00
170088	02/11/2022	AT&T	Accounts Payable Check	331.40
170089	02/11/2022	AT&T	Accounts Payable Check	102.36
170091	02/11/2022	ATASCADERO MUTUAL WATER CO.	Accounts Payable Check	5,392.80
170092	02/11/2022	AURORA WORLD, INC.	Accounts Payable Check	603.94

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
 DATE: 03/22/22  
 ATTACHMENT: 1

Check Number	Check Date	Vendor	Description	Amount
170093	02/11/2022	BARRETT'S TAMALES AND LEMONADE	Accounts Payable Check	195.00
170094	02/11/2022	BAUER COMPRESSORS	Accounts Payable Check	1,278.49
170095	02/11/2022	BILL GAINES AUDIO, INC.	Accounts Payable Check	685.20
170096	02/11/2022	ETHAN T. BLAIS	Accounts Payable Check	128.00
170097	02/11/2022	KABELO E. BLAIS	Accounts Payable Check	208.00
170098	02/11/2022	BREZDEN PEST CONTROL, INC.	Accounts Payable Check	257.00
170099	02/11/2022	BURKE, WILLIAMS, & SORENSON LLP	Accounts Payable Check	23,133.63
170100	02/11/2022	CA SECRETARY OF STATE	Accounts Payable Check	40.00
170101	02/11/2022	CENTRAL NEBRASKA PACKING, INC.	Accounts Payable Check	6,711.28
170103	02/11/2022	CHARTER COMMUNICATIONS	Accounts Payable Check	12,794.85
170104	02/11/2022	CIRCLE GRAPHICS, INC.	Accounts Payable Check	1,075.56
170105	02/11/2022	CLEVER CONCEPTS, INC.	Accounts Payable Check	117.95
170106	02/11/2022	COUNTY OF SAN LUIS OBISPO	Accounts Payable Check	63.00
170107	02/11/2022	CULLIGAN/CENTRAL COAST WTR TRT	Accounts Payable Check	70.00
170108	02/11/2022	JAROM M. DAMERY	Accounts Payable Check	204.00
170109	02/11/2022	SHARON J. DAVIS	Accounts Payable Check	500.50
170110	02/11/2022	NICHOLAS DEBAR	Accounts Payable Check	300.00
170111	02/11/2022	JOE DEBRUIN, PH.D.	Accounts Payable Check	360.00
170112	02/11/2022	HYRUM C. DEL CASTILLO	Accounts Payable Check	292.20
170113	02/11/2022	DELTA LIQUID ENERGY	Accounts Payable Check	1,253.86
170114	02/11/2022	PHILIP DUNSMORE	Accounts Payable Check	300.00
170115	02/11/2022	STEVEN J. ERNST	Accounts Payable Check	176.00
170116	02/11/2022	ESCROW CLEANING SERVICE	Accounts Payable Check	600.00
170117	02/11/2022	ETHAN J. FANNING	Accounts Payable Check	90.00
170118	02/11/2022	FASTENAL COMPANY	Accounts Payable Check	1,349.81
170119	02/11/2022	FENCE FACTORY ATASCADERO	Accounts Payable Check	4,790.00
170120	02/11/2022	FGL ENVIRONMENTAL	Accounts Payable Check	81.00
170121	02/11/2022	FRESNO CITY COLLEGE	Accounts Payable Check	828.00
170122	02/11/2022	GAS COMPANY	Accounts Payable Check	1,678.09
170123	02/11/2022	TRISTAN M. GUILLORY	Accounts Payable Check	153.00
170124	02/11/2022	HAMNER, JEWELL & ASSOCIATES	Accounts Payable Check	2,442.36
170125	02/11/2022	HART IMPRESSIONS PRINTING	Accounts Payable Check	152.25
170126	02/11/2022	HERC RENTALS, INC.	Accounts Payable Check	1,741.17
170127	02/11/2022	HIGH COUNTRY OUTDOOR, INC.	Accounts Payable Check	400.00
170128	02/11/2022	HOME DEPOT CREDIT SERVICES	Accounts Payable Check	2,453.90
170129	02/11/2022	INGLIS PET HOTEL	Accounts Payable Check	2,500.00
170130	02/11/2022	INTL. ASSC. OF FIRE CHIEFS	Accounts Payable Check	285.00
170131	02/11/2022	JIFFY LUBE	Accounts Payable Check	62.95
170132	02/11/2022	JK'S UNLIMITED, INC.	Accounts Payable Check	930.43
170133	02/11/2022	RACHEL M. JONES	Accounts Payable Check	119.00
170134	02/11/2022	KNECHT'S PLUMBING & HEATING	Accounts Payable Check	2,853.65
170135	02/11/2022	LEE WILSON ELECTRIC CO. INC	Accounts Payable Check	1,477.85
170136	02/11/2022	LIFE ASSIST, INC.	Accounts Payable Check	233.97

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
DATE: 03/22/22  
ATTACHMENT: 1

Check Number	Check Date	Vendor	Description	Amount
170137	02/11/2022	JAMES LUNDBERG	Accounts Payable Check	22.00
170138	02/11/2022	GARY V. MADGETT	Accounts Payable Check	8,300.00
170139	02/11/2022	MADRONE LANDSCAPES, INC.	Accounts Payable Check	406.00
170140	02/11/2022	MARBORG INDUSTRIES	Accounts Payable Check	62.28
170141	02/11/2022	MICHAEL K. NUNLEY & ASSC, INC.	Accounts Payable Check	50,517.31
170142	02/11/2022	MINER'S ACE HARDWARE	Accounts Payable Check	142.38
170143	02/11/2022	MISSION UNIFORM SERVICE	Accounts Payable Check	246.40
170144	02/11/2022	MV TRANSPORTATION, INC.	Accounts Payable Check	18,377.62
170145	02/11/2022	MARC NOBRIGA	Accounts Payable Check	284.40
170146	02/11/2022	DANIELLE NUNES-HAKANSON	Accounts Payable Check	39.20
170147	02/11/2022	OFFICE DEPOT INC.	Accounts Payable Check	618.89
170150	02/11/2022	PACIFIC GAS AND ELECTRIC	Accounts Payable Check	30,209.01
170151	02/11/2022	PEAKWIFI, LLC	Accounts Payable Check	2,612.00
170152	02/11/2022	PERRY'S PARCEL & GIFT	Accounts Payable Check	175.00
170153	02/11/2022	PIERRE RADEMAKER DESIGN	Accounts Payable Check	1,170.69
170154	02/11/2022	KATRINA M. PORTER	Accounts Payable Check	72.00
170155	02/11/2022	PROCARE JANITORIAL SUPPLY,INC.	Accounts Payable Check	168.94
170156	02/11/2022	PRW STEEL SUPPLY, INC.	Accounts Payable Check	104.40
170157	02/11/2022	LAUREN-ASHLEY PURIFY	Accounts Payable Check	281.00
170158	02/11/2022	R3 CONSULTING GROUP	Accounts Payable Check	6,320.00
170159	02/11/2022	RAINSCAPE, A LANDSCAPE SVC CO.	Accounts Payable Check	12,631.81
170160	02/11/2022	RAMINHA CONSTRUCTION, INC.	Accounts Payable Check	74,670.00
170161	02/11/2022	JERI RANGEL	Accounts Payable Check	300.00
170162	02/11/2022	RICK ENGINEERING COMPANY	Accounts Payable Check	21,985.32
170163	02/11/2022	RACHELLE RICKARD	Accounts Payable Check	300.00
170164	02/11/2022	BRIAN S. RICKS	Accounts Payable Check	176.00
170165	02/11/2022	MARCELES RODRIGUEZ	Accounts Payable Check	600.00
170166	02/11/2022	SHANDI SANDERS	Accounts Payable Check	124.38
170167	02/11/2022	SANTA MARIA TIRE, INC.	Accounts Payable Check	402.54
170168	02/11/2022	SCHINDLER ELEVATOR CORP	Accounts Payable Check	458.43
170169	02/11/2022	SITEONE LANDSCAPE SUPPLY, LLC	Accounts Payable Check	397.93
170170	02/11/2022	SLO CO AUDITOR CONTROLLER	Accounts Payable Check	25.00
170171	02/11/2022	SO. BAY REG. PUBLIC SAFETY	Accounts Payable Check	1,135.00
170172	02/11/2022	SP MAINTENANCE SERVICES, INC.	Accounts Payable Check	728.00
170173	02/11/2022	SPEAKWRITE, LLC.	Accounts Payable Check	976.13
170174	02/11/2022	SPECIALIZED EQUIPMENT REPAIR	Accounts Payable Check	4,196.51
170175	02/11/2022	STANLEY CONVERGENT SECURITY	Accounts Payable Check	862.98
170176	02/11/2022	STATE WATER RES CONTROL BOARD	Accounts Payable Check	2,031.00
170177	02/11/2022	SUNLIGHT JANITORIAL, INC.	Accounts Payable Check	1,700.00
170178	02/11/2022	TARGET SOLUTIONS LEARNING, LLC	Accounts Payable Check	93.36
170179	02/11/2022	TERRA VERDE ENVIRONMENTAL CONS	Accounts Payable Check	443.64
170180	02/11/2022	KARL O. TOERGE	Accounts Payable Check	103.80
170181	02/11/2022	TRAILER BARN, INC.	Accounts Payable Check	77.16

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
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Check Number	Check Date	Vendor	Description	Amount
170182	02/11/2022	TURF STAR, INC.	Accounts Payable Check	256.50
170183	02/11/2022	UNITED RENTALS (NORTH AM), INC	Accounts Payable Check	65.53
170184	02/11/2022	VERIZON WIRELESS	Accounts Payable Check	2,367.22
170185	02/11/2022	VIA BUSINESS CENTER, LLC	Accounts Payable Check	9,900.00
170186	02/11/2022	VINO VICE, INC.	Accounts Payable Check	222.00
170187	02/11/2022	WALLACE GROUP	Accounts Payable Check	5,702.05
170188	02/11/2022	WCJ PROPERTY SERVICES	Accounts Payable Check	1,365.00
170189	02/11/2022	WILLIAMS HOUSE OF CARPET, INC.	Accounts Payable Check	160.00
170190	02/11/2022	ANNE G. WILSON	Accounts Payable Check	112.50
170191	02/11/2022	WINNER CHEVROLET	Accounts Payable Check	50,058.54
170192	02/11/2022	WORKBENCH	Accounts Payable Check	56,490.00
170193	02/11/2022	KAREN B. WYKE	Accounts Payable Check	515.70
170194	02/11/2022	ZOOM IMAGING SOLUTIONS, INC.	Accounts Payable Check	986.91
170195	02/16/2022	PREFERRED BENEFITS INSURANCE	Payroll Vendor Payment	9,254.80
4316	02/17/2022	ANTHEM BLUE CROSS HSA	Payroll Vendor Payment	11,165.29
170196	02/17/2022	ATASCADERO MID MGRS ORG UNION	Payroll Vendor Payment	60.00
170197	02/17/2022	ATASCADERO POLICE OFFICERS	Payroll Vendor Payment	1,845.75
170198	02/17/2022	ATASCADERO PROF. FIREFIGHTERS	Payroll Vendor Payment	1,096.80
170199	02/17/2022	MASS MUTUAL WORKPLACE SOLUTION	Payroll Vendor Payment	7,159.72
170200	02/17/2022	MISSIONSQUARE RETIREMENT	Payroll Vendor Payment	125.00
170201	02/17/2022	NATIONWIDE RETIREMENT SOLUTION	Payroll Vendor Payment	750.78
170202	02/17/2022	NAVIA BENEFIT SOLUTIONS	Payroll Vendor Payment	1,674.10
170203	02/17/2022	SEIU LOCAL 620	Payroll Vendor Payment	815.54
170204	02/17/2022	VANTAGEPOINT TRNSFR AGT 106099	Payroll Vendor Payment	416.88
170205	02/17/2022	VANTAGEPOINT TRNSFR AGT 304633	Payroll Vendor Payment	7,250.92
170206	02/17/2022	VANTAGEPOINT TRNSFR AGT 706276	Payroll Vendor Payment	4,185.00
4318	02/18/2022	STATE DISBURSEMENT UNIT	Payroll Vendor Payment	467.07
4319	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	21,932.50
4320	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	33,402.27
4321	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,179.80
4322	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	2,650.48
4323	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	6,709.33
4324	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	8,839.58
4325	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	9,638.74
4326	02/18/2022	CALIF PUBLIC EMPLOYEES RETIREMENT SYSTEM	Payroll Vendor Payment	16,920.17
4317	02/21/2022	BANK OF NEW YORK MELLON	Accounts Payable Check	174,216.66
4327	02/22/2022	RABOBANK, N.A.	Payroll Vendor Payment	58,715.16
4328	02/22/2022	EMPLOYMENT DEV DEPARTMENT	Payroll Vendor Payment	18,606.60
4329	02/22/2022	EMPLOYMENT DEV. DEPARTMENT	Payroll Vendor Payment	2,866.33
170207	02/25/2022	13 STARS MEDIA	Accounts Payable Check	364.69
170208	02/25/2022	2 MEXICANS, LLC	Accounts Payable Check	7,070.00
170209	02/25/2022	A SUPERIOR CRANE, LLC	Accounts Payable Check	540.00
170210	02/25/2022	AGM CALIFORNIA, INC.	Accounts Payable Check	1,800.00

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
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Check Number	Check Date	Vendor	Description	Amount
170211	02/25/2022	ALL ABOUT ANIMALS	Accounts Payable Check	3,200.00
170212	02/25/2022	ALLIANT INSURANCE SERVICES INC	Accounts Payable Check	182.00
170213	02/25/2022	ALPHA ELECTRIC SERVICE	Accounts Payable Check	46.86
170214	02/25/2022	AMERICAN WEST TIRE & AUTO INC	Accounts Payable Check	2,602.98
170215	02/25/2022	DREW T. ARDOUIN	Accounts Payable Check	72.00
170217	02/25/2022	AT&T	Accounts Payable Check	928.85
170218	02/25/2022	AT&T	Accounts Payable Check	1,156.90
170219	02/25/2022	ATASCADERO HAY & FEED	Accounts Payable Check	3,961.65
170220	02/25/2022	ATASCADERO MUTUAL WATER CO.	Accounts Payable Check	6,282.45
170221	02/25/2022	AVILA TRAFFIC SAFETY	Accounts Payable Check	693.83
170222	02/25/2022	BASSETT'S CRICKET RANCH, INC.	Accounts Payable Check	1,103.42
170223	02/25/2022	BATTERY SYSTEMS, INC.	Accounts Payable Check	136.94
170224	02/25/2022	BELL'S PLUMBING REPAIR, INC.	Accounts Payable Check	213.00
170225	02/25/2022	KEITH R. BERGHER	Accounts Payable Check	45.00
170226	02/25/2022	BERRY MAN, INC.	Accounts Payable Check	2,709.15
170227	02/25/2022	KABELO E. BLAIS	Accounts Payable Check	48.00
170228	02/25/2022	BRANCH SMITH PROPERTIES	Accounts Payable Check	362.00
170229	02/25/2022	BREZDEN PEST CONTROL, INC.	Accounts Payable Check	96.00
170230	02/25/2022	CALPORTLAND COMPANY	Accounts Payable Check	391.80
170231	02/25/2022	CARQUEST OF ATASCADERO	Accounts Payable Check	377.12
170232	02/25/2022	CASEY PRINTING, INC.	Accounts Payable Check	499.16
170233	02/25/2022	CENTRAL COAST ASSETS, LLC	Accounts Payable Check	47,460.00
170234	02/25/2022	CHARTER COMMUNICATIONS	Accounts Payable Check	329.96
170235	02/25/2022	LARA CHRISTENSEN	Accounts Payable Check	200.21
170236	02/25/2022	CO OF SAN LUIS OBISPO SART PRG	Accounts Payable Check	563.00
170237	02/25/2022	COASTAL COPY, INC.	Accounts Payable Check	365.73
170238	02/25/2022	COBAN TECHNOLOGIES, INC.	Accounts Payable Check	1,170.00
170239	02/25/2022	CRYSTAL SPRINGS WATER	Accounts Payable Check	20.00
170240	02/25/2022	DESTINY CUELLAR	Accounts Payable Check	1,200.00
170241	02/25/2022	CULLIGAN/CENTRAL COAST WTR TRT	Accounts Payable Check	70.00
170242	02/25/2022	CUMMINS, INC.	Accounts Payable Check	75,932.71
170243	02/25/2022	JAROM M. DAMERY	Accounts Payable Check	68.00
170244	02/25/2022	DAN BIDDLE PEST CONTROL SERVIC	Accounts Payable Check	135.00
170245	02/25/2022	DEPARTMENT OF JUSTICE	Accounts Payable Check	49.00
170246	02/25/2022	DEPARTMENT OF TRANSPORTATION	Accounts Payable Check	3,691.73
170247	02/25/2022	DESTINATION TRAVEL NETWORK	Accounts Payable Check	75.00
170248	02/25/2022	ECONOMIC & PLANNING SYSTEM INC	Accounts Payable Check	5,221.25
170249	02/25/2022	EL CAMINO VETERINARY HOSP	Accounts Payable Check	587.50
170250	02/25/2022	ALI ELMASRI	Accounts Payable Check	112.00
170251	02/25/2022	STEVEN J. ERNST	Accounts Payable Check	96.00
170252	02/25/2022	ESCUELA DEL RIO	Accounts Payable Check	660.00
170253	02/25/2022	FARM SUPPLY COMPANY	Accounts Payable Check	106.63
170254	02/25/2022	BRIAN FERRELL	Accounts Payable Check	134.56

**City of Atascadero**  
Disbursement Listing

For the Month of February 2022

ITEM NUMBER: A-2  
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Check Number	Check Date	Vendor	Description	Amount
170255	02/25/2022	FGL ENVIRONMENTAL	Accounts Payable Check	81.00
170256	02/25/2022	FIDELITY NATIONAL TITLE	Accounts Payable Check	48.00
170257	02/25/2022	GARRY BRILL PRODUCTIONS	Accounts Payable Check	150.00
170258	02/25/2022	GAS COMPANY	Accounts Payable Check	2,910.79
170259	02/25/2022	ALEX GENTILLY	Accounts Payable Check	230.00
170260	02/25/2022	TRISTAN M. GUILLORY	Accounts Payable Check	170.00
170261	02/25/2022	HART IMPRESSIONS PRINTING	Accounts Payable Check	490.51
170262	02/25/2022	JK'S UNLIMITED, INC.	Accounts Payable Check	1,009.67
170263	02/25/2022	RACHEL M. JONES	Accounts Payable Check	153.00
170264	02/25/2022	KPRL 1230 AM	Accounts Payable Check	920.00
170265	02/25/2022	LAUTZENHISER'S STATIONARY	Accounts Payable Check	187.88
170266	02/25/2022	LAYNE LABORATORIES, INC.	Accounts Payable Check	1,373.51
170267	02/25/2022	LEE WILSON ELECTRIC CO. INC	Accounts Payable Check	8,446.60
170268	02/25/2022	LIFE ASSIST, INC.	Accounts Payable Check	1,479.93
170269	02/25/2022	LOCOMOTIV PERFORMANCE COACHING	Accounts Payable Check	10,000.00
170270	02/25/2022	MARBORG INDUSTRIES	Accounts Payable Check	62.28
170271	02/25/2022	METROPOLITAN TRANSP COMM	Accounts Payable Check	2,500.00
170272	02/25/2022	MID-COAST GEOTECHNICAL, INC.	Accounts Payable Check	1,500.00
170273	02/25/2022	MID-COAST MOWER & SAW, INC.	Accounts Payable Check	23.56
170274	02/25/2022	MID-STATE CONCRETE PRODUCTS	Accounts Payable Check	17,162.93
170275	02/25/2022	MIG	Accounts Payable Check	11,643.84
170276	02/25/2022	MINER'S ACE HARDWARE	Accounts Payable Check	928.61
170277	02/25/2022	MISSION UNIFORM SERVICE	Accounts Payable Check	324.93
170278	02/25/2022	MORRO BAY BUG COMPANY	Accounts Payable Check	547.64
170279	02/25/2022	MOSS, LEVY, & HARTZHEIM LLP	Accounts Payable Check	2,615.00
170280	02/25/2022	NEW TIMES	Accounts Payable Check	515.00
170281	02/25/2022	NORTH COUNTY BACKFLOW	Accounts Payable Check	2,870.00
170282	02/25/2022	O.C. TANNER	Accounts Payable Check	460.13
170283	02/25/2022	OFFICE DEPOT INC.	Accounts Payable Check	916.22
170284	02/25/2022	PACIFIC GAS AND ELECTRIC	Accounts Payable Check	27,299.67
170285	02/25/2022	PARRISH REPORTING	Accounts Payable Check	880.00
170286	02/25/2022	PROCARE JANITORIAL SUPPLY,INC.	Accounts Payable Check	1,008.67
170287	02/25/2022	R3 CONSULTING GROUP	Accounts Payable Check	3,208.75
170288	02/25/2022	RAINSCAPE, A LANDSCAPE SVC CO.	Accounts Payable Check	4,228.00
170289	02/25/2022	RAMIREZ CONSTRUCTION	Accounts Payable Check	25.00
170290	02/25/2022	TESS RAMIREZ	Accounts Payable Check	20.94
170291	02/25/2022	READYREFRESH BY NESTLE	Accounts Payable Check	426.00
170292	02/25/2022	RICK ENGINEERING COMPANY	Accounts Payable Check	76,599.25
170293	02/25/2022	RACHELLE RICKARD	Accounts Payable Check	104.00
170294	02/25/2022	BRIAN S. RICKS	Accounts Payable Check	48.00
170295	02/25/2022	THE SHERWIN-WILLIAMS COMPANY	Accounts Payable Check	32.61
170296	02/25/2022	SITEONE LANDSCAPE SUPPLY, LLC	Accounts Payable Check	806.48
170297	02/25/2022	SLO COUNTY SHERIFF'S OFFICE	Accounts Payable Check	52.00

City of Atascadero  
Disbursement Listing

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ITEM NUMBER: A-2  
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Check Number	Check Date	Vendor	Description	Amount
170298	02/25/2022	SOUTH COAST EMERGENCY VEH SVC	Accounts Payable Check	894.02
170299	02/25/2022	SOUZA CONSTRUCTION, INC.	Accounts Payable Check	63,688.61
170300	02/25/2022	SPECIALTY CONSTRUCTION, INC.	Accounts Payable Check	347,327.13
170301	02/25/2022	JENNIFER L. SPOTTEN	Accounts Payable Check	151.20
170302	02/25/2022	STANLEY CONVERGENT SECURITY	Accounts Payable Check	692.69
170303	02/25/2022	STAPLES CREDIT PLAN	Accounts Payable Check	256.93
170304	02/25/2022	STEVEN STUCKY	Accounts Payable Check	93.00
170305	02/25/2022	TELECOM LAW FIRM, P.C.	Accounts Payable Check	2,440.50
170306	02/25/2022	TEMPLETON UNIFORMS, LLC	Accounts Payable Check	2,543.28
170311	02/25/2022	U.S. BANK	Accounts Payable Check	34,914.23
170312	02/25/2022	U.S. BANK	Accounts Payable Check	2,923.00
170313	02/25/2022	ULTREX BUSINESS PRODUCTS	Accounts Payable Check	33.04
170314	02/25/2022	ULTREX LEASING	Accounts Payable Check	263.18
170315	02/25/2022	UNION BANK	Accounts Payable Check	40.00
170316	02/25/2022	UNITED RENTALS (NORTH AM), INC	Accounts Payable Check	2,936.26
170317	02/25/2022	USA BLUE BOOK	Accounts Payable Check	292.02
170318	02/25/2022	VERDIN	Accounts Payable Check	13,953.35
170319	02/25/2022	VERIZON WIRELESS	Accounts Payable Check	235.03
170320	02/25/2022	VINO VICE, INC.	Accounts Payable Check	555.00
170321	02/25/2022	VISIT SLO CAL	Accounts Payable Check	69,245.89
170322	02/25/2022	VISIT SLO CAL	Accounts Payable Check	1,280.00
170323	02/25/2022	VITAL RECORDS CONTROL	Accounts Payable Check	184.09
170324	02/25/2022	WALLACE GROUP	Accounts Payable Check	4,817.76
170325	02/25/2022	WORKBENCH	Accounts Payable Check	5,976.00
170326	02/25/2022	ZOO MED LABORATORIES, INC.	Accounts Payable Check	1,414.05
170327	02/25/2022	ZOOM IMAGING SOLUTIONS, INC.	Accounts Payable Check	986.91
				<u>\$2,230,475.84</u>



# Atascadero City Council

December 2021

## Staff Report - City Treasurer

### December 2021 Investment Report

#### RECOMMENDATION:

Council receive and file the City Treasurer's report for quarter ending December 31, 2021.

#### REPORT IN BRIEF:

##### Cash and Investments

Checking	\$ 3,714,655	
Zoo Credit Card Deposit Account	18,923	
Certificates of Deposit	13,920,000	
Government Securities	13,196,125	
Supranational Securities	3,497,980	
Municipal Securities	2,411,943	
LAIF	20,848,969	
Cash with Fiscal Agents	2,278,606	
Cash in Banks at December 31, 2021		\$ 59,887,201
Timing Differences		(744,407)
Cash and Investments at December 31, 2021		<u>\$ 59,142,794</u>

##### Investment Activity

#### Securities Purchased:

<u>Purchase Date</u>	<u>Description</u>	<u>Type</u>	<u>Cost</u>	<u>Maturity Date</u>
10/14/21	Rancho Adobe Fire CUSIP #752096AE7	Municipal Security	\$ 262,171	08/01/26
11/17/21	Capital One National McLean, VA	Certificate of Deposit	245,000	11/17/26
11/17/21	Capital One Bank Glen Allen, VA	Certificate of Deposit	245,000	11/17/26
12/30/21	Federal Home Loan Bank CUSIP #3130AQF65	Government Security	499,960	12/21/26
12/31/21	Bank of Kremlin Kremlin, OK	Certificate of Deposit	245,000	12/31/26

**Investment Activity (continued)**

**Securities Matured:**

<u>Maturity Date</u>	<u>Description</u>	<u>Type</u>	<u>Original Cost</u>	<u>Amount Matured</u>
10/07/21	Federal National Mortgage Assoc CUSIP #3135G0Q89	Government Security	\$ 492,903	\$ 500,000
11/17/21	First Source Bank South Bend, IN	Certificate of Deposit	245,000	245,000
11/29/21	Federal Home Loan Bank CUSIP #3130AABG2	Government Security	494,200	500,000

**Securities Sold Prior to Maturity:**

None

**Other Reportable Activities:**

None

**CITY OF ATASCADERO**  
**TREASURER'S REPORT**  
**CASH & INVESTMENTS ACTIVITY SUMMARY**  
*for the quarter ending December 31, 2021*

	<u>CHECKING ACCOUNTS</u>	<u>INVESTMENTS</u>	<u>FISCAL AGENT</u>	<u>TOTALS</u>
Balance per Banks at October 1, 2021	\$ 1,818,357	\$ 51,322,137	\$ 2,902,158	\$ 56,042,652
Receipts	15,173,769	160,405	154	15,334,328
Recognition of Premiums & Discounts	-	(23,499)	-	(23,499)
Disbursements	(10,842,574)	-	(623,706)	(11,466,280)
Transfers In	9,846,019	12,261,993	-	22,108,012
Transfers Out	<u>(12,261,993)</u>	<u>(9,846,019)</u>	<u>-</u>	<u>(22,108,012)</u>
Balance per Banks at December 31, 2021	<u>\$ 3,733,578</u>	<u>\$ 53,875,017</u>	<u>\$ 2,278,606</u>	59,887,201
Timing Differences				<u>(744,407)</u>
<b>Adjusted Treasurer's Balance</b>				<u><u>\$ 59,142,794</u></u>

CITY OF ATASCADERO  
INVESTMENT REPORT  
December 31, 2021

<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN / (LOSS)</u>
<i>Funds Managed by City</i>											
n/a	<b>Local Agency Invest. Fund (LAIF)</b>	n/a	State Investment Fund	n/a	n/a	0.21%	\$ 20,848,969	n/a	\$ 20,848,969	\$ 20,795,577	\$ (53,392)
n/a	<b>Broker Money Market</b>	n/a	Money Fund	n/a	n/a	Vary	-	n/a	-	-	-
01/13/22	<b>Federal Home Loan Bank</b> CUSIP #3137EADB2	01/26/17	Government Security	Aaa	2.38%	2.06%	500,000	56	500,056	500,325	269
02/09/22	<b>Triad Bank</b> Frontenac, MO	02/09/17	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	245,466	466
02/21/22	<b>Everbank</b> Jacksonville, FL	02/14/17	Certificate of Deposit	n/a	2.05%	2.05%	245,000	n/a	245,000	245,551	551
03/11/22	<b>Federal Home Loan Bank</b> CUSIP #313378CR0	02/23/17	Government Security	Aaa	2.25%	2.00%	500,000	239	500,239	502,025	1,786
03/24/22	<b>First Sentry Bank</b> Huntington, WV	03/24/17	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	246,000	1,000
04/05/22	<b>Federal National Mortgage Assn</b> CUSIP #3135G0T45	05/04/17	Government Security	Aaa	1.88%	1.88%	500,000	n/a	500,000	502,020	2,020
05/17/22	<b>MB Financial Bank</b> Chicago, IL	02/09/22	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	246,632	1,632
05/31/22	<b>Lakeside Bank</b> Chicago, IL	06/02/17	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	246,798	1,798
06/10/22	<b>Federal Home Loan Bank</b> CUSIP #313379Q69	05/31/17	Government Security	Aaa	2.13%	1.86%	500,000	577	500,577	504,120	3,543
07/05/22	<b>Sallie Mae Bank</b> Salt Lake City, UT	07/08/19	Certificate of Deposit	n/a	2.20%	2.20%	245,000	n/a	245,000	247,448	2,448
07/12/22	<b>Barclays Bank</b> Wilmington, DE	07/12/17	Certificate of Deposit	n/a	2.20%	2.20%	245,000	n/a	245,000	247,536	2,536
07/27/22	<b>Federal Farm Credit Bank</b> CUSIP #3133EDE65	07/12/17	Government Security	n/a	3.05%	1.98%	302,000	1,829	303,829	307,028	3,199
08/03/22	<b>Federal Farm Credit Bank</b> CUSIP #3133EHTS2	08/17/17	Government Security	Aaa	1.90%	1.72%	500,000	521	500,521	505,225	4,704

CITY OF ATASCADERO  
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<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN/(LOSS)</u>
09/09/22	<b>Federal Farm Credit Bank</b> CUSIP #313380GJ0	09/11/17	Government Security	Aaa	2.00%	1.62%	\$ 500,000	\$ 1,293	\$ 501,293	\$ 506,005	\$ 4,712
09/14/22	<b>Int'l Amer. Development Bank</b> CUSIP #4581X0CZ9	12/18/17	Supranational Security	Aaa	1.75%	2.23%	500,000	(1,689)	498,311	504,725	6,414
10/05/22	<b>Federal Farm Credit Bank</b> CUSIP #3135G0T78	01/18/18	Government Security	Aaa	2.00%	2.30%	500,000	(1,132)	498,868	506,340	7,472
11/28/22	<b>Bank of New England</b> Salem, NH	07/26/19	Certificate of Deposit	n/a	2.05%	2.05%	245,000	n/a	245,000	248,820	3,820
01/18/23	<b>Int'l Amer. Development Bank</b> CUSIP #4581X0DA3	01/18/18	Supranational Security	Aaa	2.50%	2.46%	500,000	191	500,191	510,240	10,049
01/18/23	<b>Int'l Amer. Development Bank</b> CUSIP #4581X0DA3	12/06/18	Supranational Security	Aaa	2.50%	2.90%	500,000	(2,039)	497,961	510,240	12,279
02/21/23	<b>Merrick Bank</b> South Jordan, UT	12/18/18	Certificate of Deposit	n/a	3.35%	3.35%	245,000	n/a	245,000	253,237	8,237
03/10/23	<b>Federal Farm Credit Bank</b> CUSIP #3130ADMX7	03/16/18	Government Security	Aaa	2.50%	2.71%	500,000	(1,216)	498,784	512,120	13,336
03/24/23	<b>Bell Bank</b> Fargo, ND	03/24/20	Certificate of Deposit	n/a	0.85%	0.85%	245,000	n/a	245,000	246,286	1,286
04/11/23	<b>Federal Farm Credit Bank</b> CUSIP #3133EJKN8	04/11/18	Government Security	Aaa	2.70%	2.71%	500,000	(69)	499,931	515,375	15,444
04/12/23	<b>Morgan Stanley</b> Salt Lake City, UT	04/12/18	Certificate of Deposit	n/a	2.95%	2.95%	245,000	n/a	245,000	252,867	7,867
05/08/23	<b>Old Missouri Bank</b> Springfield, MO	05/06/19	Certificate of Deposit	n/a	2.50%	2.50%	100,000	n/a	100,000	102,757	2,757
05/09/23	<b>Goldman Sachs</b> New York, NY	05/09/18	Certificate of Deposit	n/a	3.15%	3.15%	245,000	n/a	245,000	253,913	8,913
06/06/23	<b>Citibank</b> Sioux Falls, SD	06/06/18	Certificate of Deposit	n/a	3.25%	3.25%	245,000	n/a	245,000	254,692	9,692
06/27/23	<b>PeopleFirst Bank</b> Joliet, IL	03/27/20	Certificate of Deposit	n/a	1.00%	1.00%	245,000	n/a	245,000	246,823	1,823

*CITY OF ATASCADERO  
INVESTMENT REPORT  
December 31, 2021*

ITEM NUMBER:  
DATE:

A-3  
03/22/22

<i>MATURITY DATE</i>	<i>DESCRIPTION (ISSUER)</i>	<i>PURCHASE DATE</i>	<i>INVESTMENT TYPE</i>	<i>INVESTMENT RATING</i>	<i>STATED % RATE</i>	<i>YIELD</i>	<i>FACE VALUE</i>	<i>PREMIUM/ (DISCOUNT)</i>	<i>COST OF INVESTMENT</i>	<i>MARKET VALUE</i>	<i>UNREALIZED GAIN / (LOSS)</i>
07/31/23	Medallion Bank Salt Lake City, UT	07/31/18	Certificate of Deposit	n/a	3.25%	3.25%	\$ 245,000	n/a	\$ 245,000	\$ 255,535	\$ 10,535
07/31/23	Int'l Finance Corporation CUSIP #45950KCP3	09/12/18	Supranational Security	Aaa	2.88%	2.90%	500,000	(196)	499,804	516,985	17,181
08/01/23	Discover Bank Wilmington, DE	08/01/18	Certificate of Deposit	n/a	3.35%	3.35%	245,000	n/a	245,000	255,927	10,927
09/26/23	MidSouth Bank Lafayette, LA	09/26/18	Certificate of Deposit	n/a	3.10%	3.10%	245,000	n/a	245,000	255,711	10,711
09/27/23	Int'l Bank for Recon & Develop CUSIP #459058GL1	02/06/19	Supranational Security	Aaa	3.00%	2.55%	500,000	3,825	503,825	519,585	15,760
09/27/23	Nicolet National Bank Green Bay, WI	03/27/20	Certificate of Deposit	n/a	1.25%	1.25%	245,000	n/a	245,000	247,871	2,871
09/29/23	Alma Bank Astoria, NY	03/31/20	Certificate of Deposit	n/a	1.10%	1.10%	245,000	n/a	245,000	247,234	2,234
11/06/23	Federal Farm Credit Bank CUSIP #3133EJQ85	11/06/18	Government Security	n/a	3.05%	3.06%	500,000	(72)	499,928	523,665	23,737
11/08/23	Morgan Stanley Private Bank New York, NY	11/08/18	Certificate of Deposit	n/a	3.55%	3.55%	245,000	n/a	245,000	257,956	12,956
12/08/23	Federal Home Loan Bank CUSIP #3130AAHE1	04/30/20	Government Security	n/a	2.50%	0.39%	640,000	26,105	666,105	661,862	(4,243)
01/30/24	First Premier Bank Sioux Falls, SD	01/30/19	Certificate of Deposit	n/a	2.95%	2.95%	245,000	n/a	245,000	256,535	11,535
02/22/24	Bank of Delight Delight, AR	02/22/19	Certificate of Deposit	n/a	2.85%	2.85%	245,000	n/a	245,000	256,282	11,282
03/08/24	Federal Home Loan Bank CUSIP #3130AB3H7	03/07/19	Government Security	Aaa	2.38%	2.58%	750,000	(3,245)	746,755	774,945	28,190
03/27/24	First National Bank East Lansing, MI	03/27/19	Certificate of Deposit	n/a	2.75%	2.75%	245,000	n/a	245,000	256,116	11,116
04/26/24	Mainstreet Bank Fairfax, VA	05/01/19	Certificate of Deposit	n/a	2.60%	2.60%	245,000	n/a	245,000	255,547	10,547

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05/13/24	<b>Federal Farm Credit Bank</b> CUSIP #3133EKL80	05/13/19	Government Security	Aaa	2.31%	2.32%	\$ 500,000	\$ (80)	\$ 499,920	\$ 519,605	\$ 19,685
05/16/24	<b>Enterprise Bank</b> Allison Park, PA	05/16/19	Certificate of Deposit	n/a	2.60%	2.60%	245,000	n/a	245,000	255,699	10,699
06/01/24	<b>Tulare County Pension Bond</b> CUSIP #899154AW8	09/28/20	Municipal Security	A1	3.56%	0.79%	120,000	7,925	127,925	127,400	(525)
06/26/24	<b>Commerce Bank</b> Geneva, MN	06/26/19	Certificate of Deposit	n/a	2.30%	2.30%	245,000	n/a	245,000	254,229	9,229
07/26/24	<b>Abacus Federal Savings</b> New York, NY	07/26/19	Certificate of Deposit	n/a	2.00%	2.00%	245,000	n/a	245,000	252,534	7,534
08/01/24	<b>Federal Farm Credit Bank</b> CUSIP 3133EJM55	07/24/19	Government Security	Aaa	3.25%	1.92%	427,000	14,169	441,169	454,695	13,526
08/19/24	<b>CF Bank</b> Worthington, OH	08/19/19	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	251,654	6,654
08/28/24	<b>Genoa Banking Company</b> Genoa, OH	08/28/19	Certificate of Deposit	n/a	1.80%	1.80%	245,000	n/a	245,000	251,353	6,353
08/28/24	<b>Int'l Bank for Recon &amp; Develop</b> CUSIP #459056HV2	10/18/19	Supranational Security	Aaa	1.50%	1.62%	500,000	(1,534)	498,466	507,180	8,714
08/30/24	<b>Preferred Bank</b> Los Angeles, CA	08/30/19	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	251,689	6,689
09/10/24	<b>Peoples Bank</b> Rock Valley, IA	03/23/20	Certificate of Deposit	n/a	1.50%	1.50%	100,000	n/a	100,000	101,802	1,802
09/20/24	<b>Bank of Deerfield</b> Deerfield, WI	09/20/19	Certificate of Deposit	n/a	1.70%	1.70%	245,000	n/a	245,000	250,733	5,733
09/25/24	<b>Grand River Bank</b> Grandville, MI	03/25/20	Certificate of Deposit	n/a	1.00%	1.00%	245,000	n/a	245,000	246,103	1,103
10/15/24	<b>Federal National Mortgage Assn</b> CUSIP #3135G0W66	03/13/20	Government Security	Aaa	1.63%	0.81%	500,000	11,248	511,248	509,300	(1,948)
11/08/24	<b>Raymond James Bank</b> St. Petersburg, FL	11/08/19	Certificate of Deposit	n/a	1.80%	1.80%	245,000	n/a	245,000	251,456	6,456

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12/13/24	<b>Federal Home Loan Bank</b> CUSIP #3130A3GE8	03/13/20	Government Security	Aaa	2.75%	0.84%	\$ 500,000	\$ 27,838	\$ 527,838	\$ 525,760	\$ (2,078)
01/15/25	<b>Int'l Bank for Recon &amp; Develop</b> CUSIP #459058HT3	01/16/20	Supranational Security	Aaa	1.63%	1.66%	500,000	(578)	499,422	508,530	9,108
01/20/25	<b>Live Oak Banking Company</b> Wilmington, NC	01/24/20	Certificate of Deposit	n/a	1.85%	1.85%	245,000	n/a	245,000	251,916	6,916
01/24/25	<b>Baycoast Bank</b> Swansea, MA	01/24/20	Certificate of Deposit	n/a	1.70%	1.70%	245,000	n/a	245,000	250,799	5,799
02/12/25	<b>Federal Home Loan Mtge Corp</b> CUSIP #3137EAEP0	03/13/20	Government Security	Aaa	1.50%	0.79%	500,000	10,931	510,931	507,220	(3,711)
03/03/25	<b>Federal Farm Credit Bank</b> CUSIP #3133ELQY3	03/04/20	Government Security	Aaa	1.21%	0.88%	500,000	5,093	505,093	504,745	(348)
03/26/25	<b>Evergreen Bank Group</b> Oak Brook, IL	03/26/20	Certificate of Deposit	n/a	1.00%	1.00%	245,000	n/a	245,000	245,353	353
03/27/25	<b>Bank of Romney</b> Romney, WV	03/27/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	246,521	1,521
03/27/25	<b>First Jackson Bank</b> Stevenson, AL	03/27/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	246,521	1,521
04/01/25	<b>El Cajon Taxable Pension Obl</b> CUSIP 282659AX9	01/27/21	Municipal Security	Aa	1.18%	0.70%	650,000	9,999	659,999	641,830	(18,169)
04/28/25	<b>First National Bank</b> McGregor, TX	04/28/20	Certificate of Deposit	n/a	1.35%	1.35%	245,000	n/a	245,000	247,999	2,999
04/29/25	<b>Flagstar Bank</b> Troy, MI	03/26/20	Certificate of Deposit	n/a	1.15%	1.15%	245,000	n/a	245,000	246,389	1,389
07/01/25	<b>University of California</b> CUSIP #91412GU94	10/22/20	Municipal Security	Aa2	3.06%	0.81%	300,000	23,336	323,336	318,981	(4,355)
09/01/25	<b>San Bernardino Successor Agency</b> Swansea, MA	10/22/20	Municipal Security	Aa	4.00%	0.71%	175,000	20,840	195,840	194,143	(1,697)
10/01/25	<b>Folsom Cordova School District</b> CUSIP #34440PCN9	11/10/20	Municipal Security	Aa-	3.00%	1.00%	400,000	29,423	429,423	423,512	(5,911)

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<u>MATURITY DATE</u>	<u>DESCRIPTION (ISSUER)</u>	<u>PURCHASE DATE</u>	<u>INVESTMENT TYPE</u>	<u>INVESTMENT RATING</u>	<u>STATED % RATE</u>	<u>YIELD</u>	<u>FACE VALUE</u>	<u>PREMIUM/ (DISCOUNT)</u>	<u>COST OF INVESTMENT</u>	<u>MARKET VALUE</u>	<u>UNREALIZED GAIN / (LOSS)</u>
11/07/25	Federal National Mortgage Assn CUSIP #3135G06G3	12/14/20	Government Security	Aaa	0.50%	0.42%	\$ 500,000	\$ 1,528	\$ 501,528	\$ 487,840	\$ (13,688)
11/15/25	Tulare Sewer Revenue CUSIP 899124MF5	12/11/20	Municipal Security	Aa	1.46%	0.58%	400,000	13,344	413,344	399,348	(13,996)
12/11/25	BMW Bank North America Salt Lake City, UT	12/11/20	Certificate of Deposit	n/a	0.50%	0.50%	245,000	n/a	245,000	239,127	(5,873)
12/18/25	Third Federal Savings & Loan Cleveland, OH	12/18/20	Certificate of Deposit	n/a	1.46%	1.46%	245,000	n/a	245,000	238,583	(6,417)
01/15/26	First Reliance Bank Florence, SC	01/15/21	Certificate of Deposit	n/a	0.30%	0.30%	245,000	n/a	245,000	236,851	(8,149)
01/22/26	ConnectOne Bank Englewood Cliffs, NJ	01/22/21	Certificate of Deposit	n/a	0.45%	0.45%	245,000	n/a	245,000	238,238	(6,762)
01/22/26	Luana Savings Bank Luana, IA	01/22/21	Certificate of Deposit	n/a	0.40%	0.40%	245,000	n/a	245,000	237,770	(7,230)
02/11/26	Ind'l & Com'l Bank of China New York, NY	02/22/21	Certificate of Deposit	n/a	0.45%	0.45%	245,000	n/a	245,000	238,069	(6,931)
03/02/26	Federal Farm Credit Bank CUSIP #3133EFH91	03/03/21	Government Security	Aaa	2.22%	0.75%	876,000	52,704	928,704	911,425	(17,279)
03/27/26	Federal Agriculture Mtge Corp CUSIP #31422XDX7	03/30/21	Government Security	n/a	0.83%	0.87%	500,000	(790)	499,210	492,385	(6,825)
04/23/26	Malaga Bank Palos Verdes Peninsula, CA	04/23/21	Certificate of Deposit	n/a	0.55%	0.55%	245,000	n/a	245,000	238,405	(6,595)
04/24/26	Federal National Mortgage Assn CUSIP #3135G0K36	04/26/21	Government Security	Aaa	2.13%	0.77%	500,000	28,763	528,763	518,495	(10,268)
05/19/26	Eaglemark Savings Bank Reno, NV	05/19/21	Certificate of Deposit	n/a	0.70%	0.70%	245,000	n/a	245,000	239,747	(5,253)
06/30/26	UBS Bank USA Salt Lake City, UT	05/19/21	Certificate of Deposit	n/a	0.90%	0.90%	245,000	n/a	245,000	241,528	(3,472)
07/01/26	New York Community Bank Hicksville, NY	06/29/21	Certificate of Deposit	n/a	0.85%	0.85%	245,000	n/a	245,000	240,992	(4,008)

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MATURITY DATE	DESCRIPTION (ISSUER)	PURCHASE DATE	INVESTMENT TYPE	INVESTMENT RATING	STATED % RATE	YIELD	FACE VALUE	PREMIUM/ (DISCOUNT)	COST OF INVESTMENT	MARKET VALUE	UNREALIZED GAIN / (LOSS)
07/22/26	Toyota Financial Savings Bank Henderson, NV	07/22/21	Certificate of Deposit	n/a	0.95%	0.95%	\$ 245,000	n/a	\$ 245,000	\$ 241,918	\$ (3,082)
08/01/26	Rancho Adobe Fire Protection CUSIP #752096AE7	10/14/21	Municipal Security	Aa	1.43%	1.25%	260,000	2,077	262,077	257,850	(4,227)
08/13/26	Synchrony Bank Draper, UT	08/13/21	Certificate of Deposit	n/a	0.90%	0.90%	245,000	n/a	245,000	241,210	(3,790)
09/24/26	Federal National Mortgage Assn CUSIP #3135G0Q22	09/24/21	Government Security	Aaa	1.88%	0.80%	500,000	25,012	525,012	513,755	(11,257)
09/29/26	First Bank Richmond Richmond, IN	09/29/21	Certificate of Deposit	n/a	0.55%	0.55%	245,000	n/a	245,000	236,920	(8,080)
11/17/26	Capital One National McLean, VA	11/17/21	Certificate of Deposit	n/a	1.10%	1.10%	245,000	n/a	245,000	242,775	(2,225)
11/17/26	Capital One Bank Glen Allen, VA	11/17/21	Certificate of Deposit	n/a	1.10%	1.10%	245,000	n/a	245,000	242,775	(2,225)
12/21/26	Federal Home Loan Bank CUSIP #3130AQF65	12/30/21	Government Security	Aaa	1.25%	1.26%	500,000	(178)	499,822	498,460	(1,362)
12/31/26	Bank of Kremlin Kremlin, OK	12/31/21	Certificate of Deposit	n/a	1.05%	1.05%	245,000	n/a	245,000	241,869	(3,131)
<b>Total Funds Managed by the City</b>							<u>53,568,969</u>	<u>306,048</u>	<u>53,875,017</u>	<u>54,069,933</u>	<u>194,916</u>
<b>Funds Managed by Fiscal Agent</b>											
n/a	BNY Western Trust Hamilton Treas. Money	n/a	Treasury Fund	Aaa	n/a	1.09%	1,404,956	n/a	1,404,956	2,028,564	623,608
n/a	BNY Western Trust Hamilton Treas. Money	n/a	Treasury Fund	Aaa	n/a	0.88%	873,650	n/a	873,650	873,594	(56)
<b>Total Funds Managed by Fiscal Agent</b>							<u>2,278,606</u>	<u>n/a</u>	<u>2,278,606</u>	<u>2,902,158</u>	<u>623,552</u>
							<u>\$ 55,847,575</u>	<u>\$ 306,048</u>	<u>\$ 56,153,623</u>	<u>\$ 56,972,091</u>	<u>\$ 818,468</u>

Average Maturity of Total Portfolio 796 Days  
Weighted Average Yield of Total Portfolio 1.08%

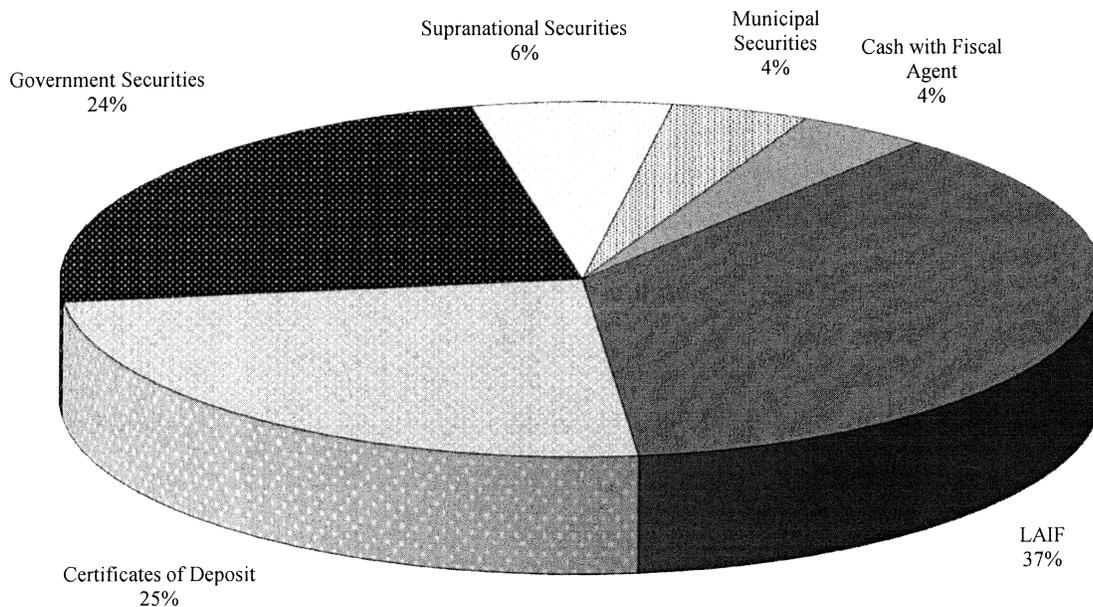
**Certification:**

It has been verified that this investment portfolio is in conformity with the City of Atascadero's investment policy, which was approved by the City Council on September 8, 2020. The City Treasurer certifies that there is sufficient liquidity to meet the City of Atascadero's estimated future expenditures for a period of six months.

Verified by: Jeri Rangel  
Jeri Rangel - Director of Administrative Services

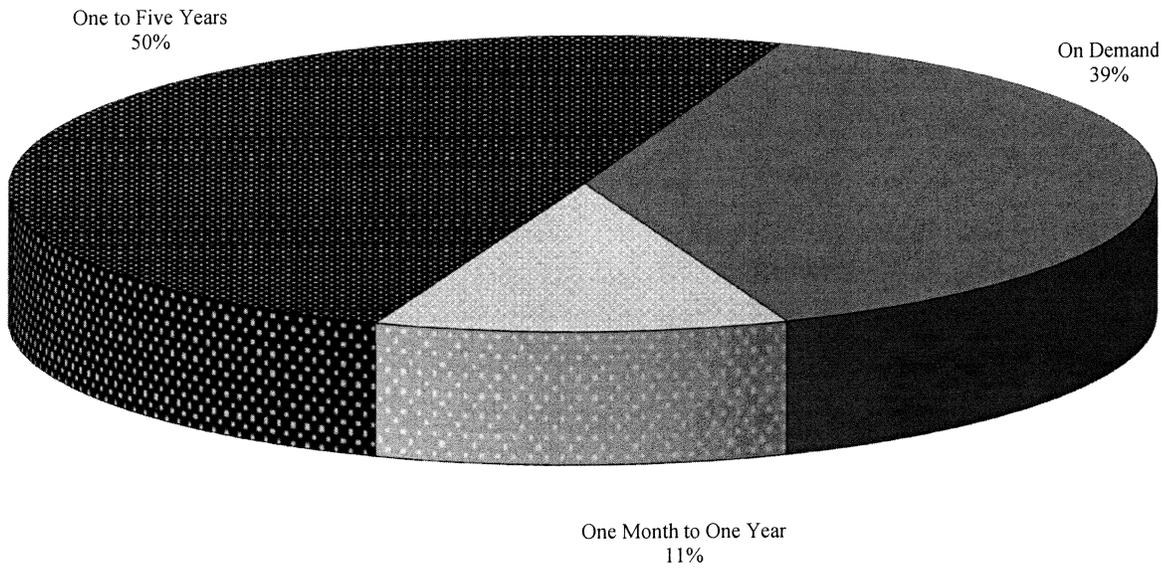
Approved by: Gere Sibbach  
Gere Sibbach - City Treasurer

**City of Atascadero  
Investments by Type  
December 2021**



<u>Investment</u>	<u>December 2021</u>
LAIF	\$ 20,848,969
Certificates of Deposit	13,920,000
Government Securities	13,196,125
Supranational Securities	3,497,980
Municipal Securities	2,411,943
Cash with Fiscal Agent	2,278,606
	<u>\$ 56,153,623</u>

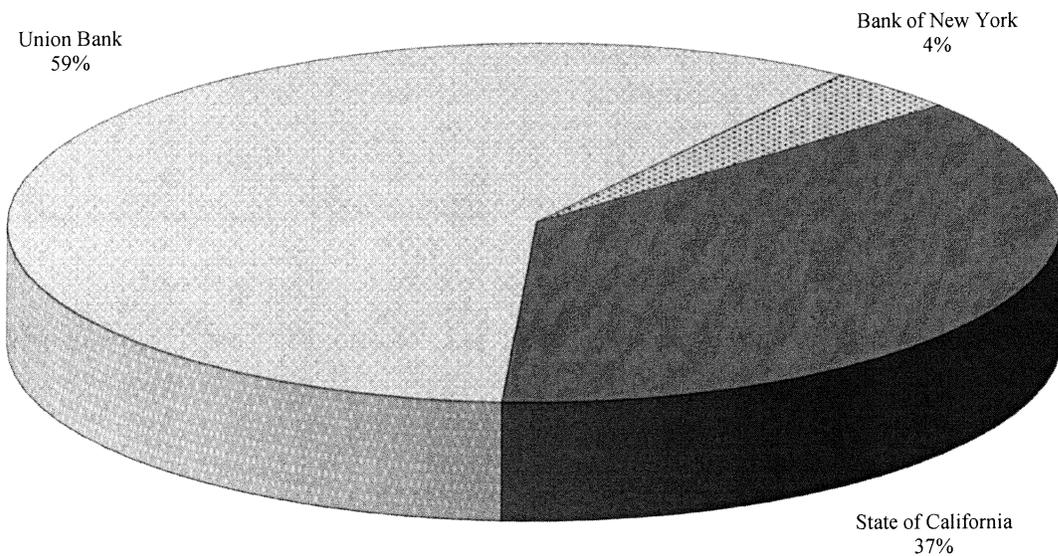
**City of Atascadero  
 Investments by Maturity \*  
 December 2021**



<u>Investment</u>	<u>December 2021</u>
On Demand	\$ 20,848,969
One Month to One Year	6,263,694
One to Five Years	26,762,354
	<u>\$ 53,875,017</u>

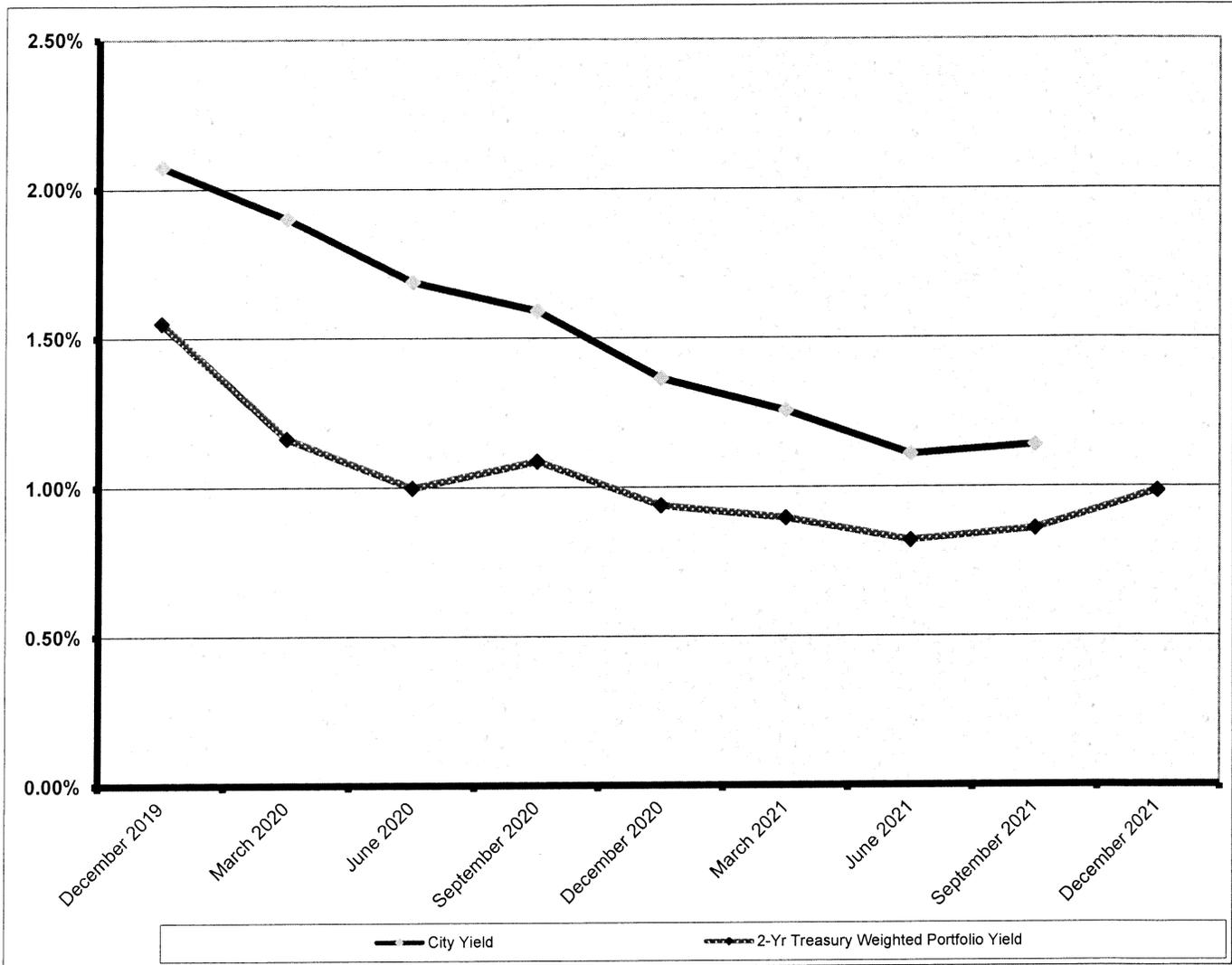
\* Cash with fiscal agent is not included in the totals for this graph because the amounts are restricted based on bond covenants, and therefore, the City doesn't retain the option to liquefy these funds at will.

**City of Atascadero  
Investments by Custodial Agent  
December 2021**



<u>Custodial Agent</u>	<u>December 2021</u>
State of California	\$ 20,848,969
Union Bank	33,026,048
Bank of New York	2,278,606
	<u>\$ 56,153,623</u>

**City of Atascadero**  
**Investment Yield vs. 2-Year Treasury Yield**  
**For the Quarter Ended December 31, 2021**



	<u>City Yield</u>	<u>2-Yr Treasury Weighted Portfolio Yield</u>
December 2019	2.07%	1.55%
March 2020	1.90%	1.16%
June 2020	1.69%	1.00%
September 2020	1.59%	1.09%
December 2020	1.36%	0.94%
March 2021	1.26%	0.90%
June 2021	1.11%	0.82%
September 2021	1.14%	0.86%
December 2021	1.08%	0.99%



# ***Atascadero City Council***

## ***Staff Report – City Manager’s Office***

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### **SB 1383 – MWEL0 and CALGreen Requirements**

#### **RECOMMENDATION:**

Council adopt, on second reading, a Draft Ordinance amending Title 8, (Building Code) Chapter 8 and Chapter 10 of the Atascadero Municipal Code, to implement CALGreen requirements for covered projects and to establish water efficient landscape and irrigation requirements in compliance with Senate Bill 1383.

#### **DISCUSSION:**

As part of SB 1383 compliance, the City is required to specifically adopt an ordinance or other enforceable measure that requires compliance with specific sections of the California Green Building Code (CALGreen) and the State’s Model Water Efficient Landscape Ordinance (MWEL0) in order to support California’s efforts to reduce emissions of short-lived climate pollutants.

At the March 8, 2022 Council Meeting, the Council introduced the attached Draft Ordinance amending the Atascadero Municipal Code Title 8, Chapter 8, by adding Section 8-8.102 and Title 8, Chapter 10, by adding Section 8-10.103. On a 5:0 vote, the ordinance was introduced and is before the Council for final approval tonight.

Some of the changes to the Municipal Code include adding CALGreen recycling requirements for commercial and multi-family dwelling units, management of construction and demolition debris, water efficient landscape requirements for projects subject to MWEL0 and mulch and compost use requirements for certain landscape installations.

#### **FISCAL IMPACT:**

None.

#### **ATTACHMENT:**

Draft Ordinance

**DRAFT ORDINANCE**

**AN ORDINANCE OF THE CITY COUNCIL OF THE CITY OF ATASCADERO, CALIFORNIA, AMENDING TITLE 8, CHAPTERS 8 (GREEN BUILDING CODE) AND 10 (WATER EFFICIENT LANDSCAPE AND IRRIGATION), OF THE ATASCADERO MUNICIPAL CODE ADDING SECTIONS 8-8.102 (CALGREEN RECYCLING REQUIREMENTS) AND 8-10.103 (WATER EFFICIENT LANDSCAPE AND IRRIGATION REQUIREMENTS) REQUIRING COMPLIANCE WITH SPECIFIC SECTIONS OF THE CALIFORNIA GREEN BUILDING CODE AND STATE MODEL WATER EFFICIENT LANDSCAPE AS REQUIRED BY SENATE BILL 1383**

**WHEREAS**, the City of Atascadero previously adopted the California Green Building Standards Code (CALGreen) and Model Water Efficient Landscape Ordinance (MWELo), by reference, in compliance with the State requirements; and

**WHEREAS**, in September 2016, Governor Brown signed into law Senate Bill 1383 (SB 1383) establishing methane reduction targets in an effort to curb the presence of methane emissions caused by organic waste; and

**WHEREAS**, SB 1383, the Short-lived Climate Pollutant Reduction Act of 2016, requires jurisdictions to adopt and enforce an ordinance or enforceable mechanism that requires compliance with specific sections of CALGreen and MWELo; and

**WHEREAS**, SB 1383 became effective on January 1, 2022, and local jurisdictions are required to amend their Municipal Code to enact regulations set forth in SB 1383 and provide a copy of the adopted ordinance to CalRecycle by April 1, 2022; and

**WHEREAS**, a timely and properly noticed Public Hearing upon the subject amendments was held by the City Council of the City of Atascadero on March 8, 2022, at which hearing evidence, oral and documentary, was admitted on behalf of said amendments.

**NOW THEREFORE, THE CITY COUNCIL OF THE CITY OF ATASCADERO HEREBY ORDAINS AS FOLLOWS:**

**SECTION 1. Recitals:** The above recitals are true and correct.

**SECTION 2. Determination.** The City Council has determined that Title 8 be amended to update Chapter 8 adding 8-8.102, adopting CALGreen recycling requirements and Chapter 10 adding 8-10.103, establishing requirements for water efficient landscape and irrigation as set forth in Exhibit “A” and “B” respective, of this Ordinance, attached hereto and incorporated herein by reference.

**SECTION 3. CEQA.** The proposed Title 8 amendments are exempt from the California Environmental Quality Act (CEQA), Public resources Code Section 21000 et seq., because it can be seen with certainty that there is no possibility that the enactment of this Ordinance would have a significant effect on the environment (Pub. Resources Code § 21065; CEQA Guidelines §§ 15378(b)(4), 15061(b)(3)).

**SECTION 4. Interpretation.** This Ordinance must be broadly construed in order to achieve the purposes stated in this Ordinance. It is the City Council’s intent that the provisions of this Ordinance be interpreted or implemented by the City and others in a manner that facilitates the purposes set forth in this Ordinance.

**SECTION 5. Preservation.** Repeal of any provision of the AMC or of any previous Code Sections, does not affect any penalty, forfeiture, or liability incurred before, or preclude prosecution and imposition of penalties for any violation occurring before this Ordinance’s effective date. Any such repealed part will remain in full force and effect for sustaining action or prosecuting violations occurring before the effective date of this Ordinance.

**SECTION 6. Effect of Invalidation.** If this entire Ordinance or its application is deemed invalid by a court of competent jurisdiction, any repeal or amendment of the AMC or other City Ordinance by this Ordinance will be rendered void and cause such previous AMC provision or other City Ordinance to remain in full force and effect for all purposes.

**SECTION 7. Severability.** If any part of this Ordinance or its application is deemed invalid by a court of competent jurisdiction, the City Council intends that such invalidity will not affect the effectiveness of the remaining provisions or applications and, to this end, the provisions of this Ordinance are severable.

**SECTION 8. Notice.** The City Clerk is directed to certify the passage and adoption of this Ordinance; cause it to be entered into the City of Atascadero’s book of original ordinances; make a note of the passage and adoption in the records of this meeting; and, within fifteen (15) days after the passage and adoption of this Ordinance, cause it to be published or posted in accordance with California law.

**SECTION 9. Effective Date.** This Ordinance will take effect on the 30th day following its final passage and adoption.

**INTRODUCED** at a regular meeting of the City Council held on March 8, 2022, and **PASSED, APPROVED** and **ADOPTED** by the City Council of the City of Atascadero, State of California, on \_\_\_\_\_, 2022.

CITY OF ATASCADERO

\_\_\_\_\_  
Heather Moreno, Mayor

ATTEST:

\_\_\_\_\_  
Lara K. Christensen, City Clerk

APPROVED AS TO FORM:

\_\_\_\_\_  
Brian A. Pierik, City Attorney

**Title 8 BUILDING CODE**

**Chapter 8 GREEN BUILDING CODE**

**8-8.101 Modifications to the California Green Building Code.**

**8-8.102 Compliance with the California Green Building Code Recycling Requirements.**

**8-8.102 Compliance with the California Green Building Code Recycling Requirements.**

- (a) Persons applying for a permit from the City for new construction and building additions and alterations shall comply with the requirements of this Section and all required components of the California Green Building Standards Code, 24 CCR, Part 11, known as CALGreen, as amended, if its project is covered by the scope of CALGreen.
- (b) For projects covered by CALGreen, the applicants must, as a condition of the City's permit approval, comply with the following:
  - (1) Where five (5) or more Multi-Family dwelling units are constructed on a building site, provide readily accessible areas that serve Occupants of all buildings on the site and are identified for the storage and collection of Recyclable Materials Container and Organic Materials Container materials, consistent with the three or more-container collection program offered by the City/County/District, or comply with provision of adequate space for recycling for Multi-Family Premises and Commercial Premises pursuant to Sections 4.408.1, 4.410.2, 5.408.1, and 5.410.1 of the California Green Building Standards Code, 24 CCR, Part 11 as amended provided amended requirements are more stringent than the CALGreen requirements for adequate recycling space effective January 1, 2020.
  - (2) New Commercial or Multi-Family construction or additions resulting in more than 30% of the floor area shall provide readily accessible areas identified for the storage and collection of Recyclable Materials Container and Organic Materials Container materials, consistent with the three or more-container collection program offered by the City/County/District, or shall comply with provision of adequate space for recycling for Multi-Family Premises and Commercial Premises pursuant to Sections 4.408.1, 4.410.2, 5.408.1, and 5.410.1 of the California Green Building Standards Code, 24 CCR, Part 11 as amended provided amended requirements are more stringent than the CALGreen requirements for adequate recycling space effective January 1, 2020.
  - (3) Comply with CALGreen requirements and applicable law related to management of construction and demolition debris (C&D), including diversion of Organic Waste in C&D from disposal. Comply with all written and published City policies and/or administrative guidelines regarding the collection, recycling, diversion, tracking, and/or reporting of C&D.

**Title 8 BUILDING CODE**

**Chapter 10 WATER EFFICIENT LANDSCAPE AND IRRIGATION**

**8-10.101 Purpose.**

**8-10.102 Adoption of Code.**

**8-10.103 Water Efficient Landscape and Irrigation Requirements.**

**8-10.103 Water Efficient Landscape and Irrigation Requirements**

This section is intended to comply with the State’s Model Water Efficiency Landscape Ordinance, and standards found in 23 CCR, Division 2, Chapter 2.7.

(a) Property Owners or their building or landscape designers, including anyone requiring a building or planning permit, plan check, or landscape design review from the City, who are constructing a new (Single-Family, Multi-Family, public, institutional, or Commercial) project with a landscape requirement area greater than 500 square feet, or rehabilitating an existing landscape under City review jurisdiction with a total landscape area greater than 2,500 square feet, shall comply with Sections 492.6(a)(3)(B) (C), (D), and (G) of the MWELO, including sections related to use of compost and mulch as delineated in this Chapter.

(b) Property Owners or their building or landscape designers that meet the threshold for MWELO compliance outlined in Section (a) above shall:

(1) Comply with Sections 492.6 (a)(3)(B)(C), (D) and (G) of the MWELO, which requires the submittal of a landscape design plan with a soil preparation, mulch, and amendments section to include the following:

(A) For landscape installations, compost at a rate of a minimum of four cubic yards per 1,000 square feet of permeable area shall be incorporated to a depth of six (6) inches into the soil. Soils with greater than six percent (6%) organic matter in the top six (6) inches of soil are exempt from adding Compost and tilling.

(B) For landscape installations, a minimum three- (3) inch layer of mulch shall be applied on all exposed soil surfaces of planting areas except in turf areas, creeping or rooting groundcovers, or direct seeding applications where mulch is contraindicated. To provide habitat for beneficial insects and other wildlife up to five percent (5%) of the landscape area may be left without mulch. Designated insect habitat must be included in the landscape design plan as such.

(C) Organic mulch materials made from recycled or post-consumer materials shall take precedence over inorganic materials or virgin forest products unless the recycled post-consumer organic products are not locally available. Organic mulches are not required where prohibited by local fuel modification plan guidelines or other applicable local ordinances.

(2) The MWELO compliance items listed in this Section are not an inclusive list of MWELO requirements; therefore, property owners or their building or landscape designers that meet the threshold for MWELO compliance outlined in this Chapter shall consult the full MWELO for all requirements.

(c) If, after the adoption of this Chapter, the California Department of Water Resources, or its successor agency, amends 23 CCR, Division 2, Chapter 2.7, Sections 492.6(a)(3)(B) (C), (D), and (G) of the MWWELO September 15, 2015 requirements in a manner that requires City to incorporate the requirements of an updated MWELO in a local ordinance, and the amended requirements include provisions more stringent than those required in this Section, the revised requirements of 23 CCR, Division 2, Chapter 2.7 shall be enforced.



# Atascadero City Council

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## Staff Report – Public Works Department

### Approve Parcel Map AT 20-0013

#### RECOMMENDATION:

Council adopt Draft Resolution approving Parcel Map AT 20-0013 and accept an offer of street and public utility easement on behalf of the public, and order the summary vacation of an unbuilt portion of Ramona Road right-of-way.

#### DISCUSSION:

Tentative Parcel Map AT 20-0013 was approved by the Atascadero Planning Commission on October 20, 2020 (PC Resolution 2020-0014) and involves reconfiguring two residential lots at 2930 and 2945 Ramona Road (APN 049-212-001 and 049-211-038, respectively) into four residential lots. Ramona Road (City-maintained) was constructed outside of the current right-of-way and is situated through the 2930 Ramona Road parcel (see map below). This parcel map includes an offer of dedication for public street and utility easement over the constructed portion of Ramona Road, and also includes the abandonment of the unused Ramona Road right-of-way. A copy of the parcel map is attached to the Draft Resolution.





Requirements for summarily vacating a road are found in the Streets and Highways Code (SHC), Section 8331, which provides:

- 8331. *The legislative body of a local agency may summarily vacate a street or highway if both of the following conditions exist:*
  - (a) *For a period of five consecutive years, the street or highway has been impassable for vehicular travel.*
  - (b) *No public money was expended for maintenance on the street or highway during such period.*

In addition, California Government Code (CGC) Section 65402 requires that all abandonments be consistent with the legislative bodies General Plan, as follows:

*“If a general plan or part thereof has been adopted...no real property shall be...vacated or abandoned...until the location, purpose and extent of such...street vacation or abandonment...has been submitted to and reported upon by the planning agency as to the conformity with said general plan or part thereof.”*

The portion of Ramona Road to be vacated is unbuilt and meets the summary vacation requirements of SHC 8331. In addition, the Planning Commission recommends vacating this unbuilt portion of Ramona Road since new right-of-way is being dedicated over the existing road to keep Ramona Road a contiguous section, which was determined to be consistent with the circulation element of the City’s General Plan.

The City Engineer and Community Development Director have reviewed Parcel Map AT 20-0013 and find it to be in substantial conformance with the approved Tentative Parcel Map. Pursuant to California Government Code Title 7, Division 2, the approving legislative body (City Council) shall not deny a Parcel Map provided it finds the Parcel Map is in substantial conformance with the previously approved Tentative Parcel Map.

If adopted, the Parcel Map will be recorded by County Recorder’s Office within ten business days.

**FISCAL IMPACT:**

None.

**ATTACHMENT:**

Draft Resolution (with Parcel Map AT 20-0013)

**DRAFT RESOLUTION**

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF  
ATASCADERO, CALIFORNIA, APPROVING PARCEL MAP AT 20-0013  
AND ORDERING THE SUMMARY VACATION OF AN UNBUILT  
PORTION OF RAMONA ROAD RIGHT-OF-WAY**

**WHEREAS**, Tentative Parcel Map AT 20-0013 involves the reconfiguration of two residential lots at 2930 and 2945 Ramona Road (APN 049-212-001 and 049-211-038, respectively) into four residential lots; and

**WHEREAS**, a portion of Ramona Road was constructed outside the existing unbuilt right-of-way that lies between the two said existing parcels, and is situated upon a portion of the 2930 Ramona Road parcel; and

**WHEREAS**, Tentative Parcel Map AT 20-0013 includes an offer of dedication for street and public utility easement over the said constructed portion of Ramona Road, and further includes the abandonment of the unused portion of Ramona Road right-of-way between the two existing parcels; and

**WHEREAS**, a determination has been made that the proposed map and right-of-way vacation is exempt from environmental review in accordance with Section 15301 (Existing Facilities) and Section 15304 (Minor Alterations to Land) of the California Environmental Quality Act (CEQA) and the City of Atascadero's Local Procedures for implementing CEQA; and

**WHEREAS**, on October 20, 2020, the Planning Commission of the City of Atascadero held a duly public hearing to consider Tentative Parcel Map AT 20-0013 and the abandonment of an unbuilt portion of Ramona Road right-of-way as shown on said parcel map and shown on the map recorded in Book 3AC of maps AT Page 19A in the County Clerk-Recorder's Office; and

**WHEREAS**, on October 20, 2020, the Planning Commission passed PC Resolution 2020-0014, finding and determining that said abandonment is consistent with the City's General Plan and recommends the City Council approve Tentative Parcel Map AT 20-0013 and summarily vacate a portion of Ramona Road.

**NOW, THEREFORE BE IT RESOLVED**, by the City Council of the City of Atascadero:

**SECTION 1.** The City Council hereby finds determines the above recitals to be true and correct.

**SECTION 2.** The City Council finds and determines that said unbuilt portion of Ramona Road right-of-way as shown on Parcel Map AT 20-0013, attached as Exhibit A to this Resolution and incorporated herein by this reference, has never been improved and has been impassable for vehicular travel for a period of five consecutive years and no public funds have been expended for maintenance on the subject right-of-way during such period.

**SECTION 3.** Pursuant to Section 8300 et seq. of the California Streets and Highways Code and a finding of General Plan consistency, this Council finds and determines that a portion of Ramona Road proposed to be abandoned, as shown on Parcel Map AT 20-0013 and more particularly detailed on Sheet 5 of said map, is not necessary for present or future public right-of-way purposes with the approval of Parcel Map AT 20-0013 and the acceptance of offer of dedication of street and public utility easement over existing improved Ramona Road.

**SECTION 4.** The City Council hereby approves Parcel Map AT 20-0013 and the offer of dedication for street and public utility easement, as shown on said map and particularly detailed on Sheet 5 of said map, is accepted on behalf of the public.

**SECTION 5.** The City Council hereby orders said portion of Ramona Road right-of-way to be summarily vacated and no longer constitutes a street or public service easement from and after the date the resolution is recorded.

**SECTION 6.** The City Clerk shall cause a certified copy of this Resolution, duly attested under the seal of the City, to be recorded in the Office of the San Luis Obispo County Recorder.

**PASSED AND ADOPTED** at a regular meeting of the City Council held on the \_\_\_ day of \_\_\_, 2022.

On motion by Council Member \_\_\_\_\_ and seconded by Council Member \_\_\_\_\_, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

- AYES:
- NOES:
- ABSENT:
- ABSTAIN:

CITY OF ATASCADERO

\_\_\_\_\_  
Heather Moreno, Mayor

ATTEST:

\_\_\_\_\_  
Lara K. Christensen, City Clerk

APPROVED AS TO FORM:

\_\_\_\_\_  
Brian Pierik, City Attorney

**OWNER'S STATEMENT**

WE, THE UNDERSIGNED, HEREBY STATE THAT WE ARE ALL THE OWNERS OF, AND ALL RECORD HOLDERS OF SECURITY INTEREST IN, AND ALL PARTIES HAVING ANY RECORD TITLE INTEREST IN THE REAL PROPERTY INCLUDED WITHIN THE SUBDIVISION AND PROJECT SHOWN ON THIS MAP, AND THAT EACH OF US DOES HEREBY CONSENT TO THE FILING AND/OR RECORDATION OF THIS MAP.

WE HEREBY DEDICATE TO THE PUBLIC, EASEMENT FOR PUBLIC STREET PURPOSES AS SHOWN ON THIS MAP. WE ALSO HEREBY DEDICATE TO THE PUBLIC FOR PUBLIC USE AND BENEFIT OF THE SEVERAL UTILITY COMPANIES AND ATASCADERO MUTUAL WATER COMPANY ("AMWC") WHICH ARE AUTHORIZED TO SERVE IN SAID SUBDIVISION, EASEMENTS FOR PUBLIC UTILITY PURPOSES, DELINEATED ON SAID MAP AS "PUBLIC UTILITY EASEMENT" OR "P.U.E."

WE ALSO RESERVE TO OURSELVES, OUR HEIRS AND ASSIGNS CERTAIN PRIVATE EASEMENTS FOR PRIVATE DRIVEWAY AND UTILITY EASEMENT FOR THE USE AND BENEFIT OF THE PRESENT OR FUTURE OWNERS OF THE LOTS AFFECTED BY SUCH EASEMENTS AS DELINEATED ON SAID MAP.

NICHOLAS C. MILLER AND LYNN V. MILLER, AS TRUSTEES OF THE NICHOLAS C. MILLER AND LYNN V. MILLER REVOCABLE TRUST DATED SEPTEMBER 11, 2014.

BY: \_\_\_\_\_  
NICHOLAS C. MILLER, CO-TRUSTEE

BY: \_\_\_\_\_  
LYNN V. MILLER, CO-TRUSTEE

**SIGNATURE OMISSIONS**

THE SIGNATURE ATASCADERO MUTUAL WATER COMPANY, OWNER OF RIGHTS OF WAY AND OTHER RIGHTS NECESSARY TO ATASCADERO MUTUAL WATER COMPANY, AS DISCLOSED BY DEED RECORDED IN BOOK 113 OF DEEDS AT PAGE 56 OF SAN LUIS OBISPO COUNTY HAS BEEN OMITTED UNDER THE PROVISIONS OF SECTION 66436 SUBSECTION (A-3-A) OF THE SUBDIVISION MAP ACT, THEIR INTEREST IS SUCH THAT IT CANNOT RIPEN INTO A FEE TITLE AND SAID SIGNATURE IS NOT REQUIRED BY THE GOVERNING BODY.

**UNPLOTTABLE EASEMENTS**

THERE ARE CERTAIN EASEMENTS AFFECTING THIS SUBDIVISION THAT ARE NOT PLOTTABLE.

- 1. EASEMENTS GRANTED TO ATASCADERO MUTUAL WATER COMPANY BY DEED RECORDED 18 NOVEMBER 1918 AND FILED IN BOOK 113 OF DEEDS AT PAGE 56 OF SAN LUIS OBISPO, CALIFORNIA.

**NOTARIAL**

A NOTARY PUBLIC OR OTHER OFFICER COMPLETING THIS CERTIFICATE VERIFIES ONLY THE IDENTITY OF THE INDIVIDUAL WHO SIGNED THE DOCUMENT TO WHICH THIS CERTIFICATE IS ATTACHED, AND NOT THE TRUTHFULNESS, ACCURACY OR VALIDITY OF THAT DOCUMENT.

STATE OF CALIFORNIA  
COUNTY OF SAN LUIS OBISPO

ON \_\_\_\_\_ BEFORE ME \_\_\_\_\_ A NOTARY PUBLIC, PERSONALLY APPEARED NICHOLAS C. MILLER AND LYNN V. MILLER, WHO PROVED TO ME ON THE BASIS OF SATISFACTORY EVIDENCE TO BE THE PERSONS WHOSE NAMES ARE SUBSCRIBED TO THE WITHIN INSTRUMENT AND ACKNOWLEDGED TO ME THAT THEY EXECUTED THE SAME IN THEIR AUTHORIZED CAPACITIES, AND THAT BY THEIR SIGNATURES ON THE INSTRUMENT THE PERSONS, OR THE ENTITY UPON BEHALF OF WHICH THE PERSONS ACTED, EXECUTED THE INSTRUMENT.

I CERTIFY UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING PARAGRAPH IS TRUE AND CORRECT.

WITNESS MY HAND AND OFFICIAL SEAL.

SIGNATURE \_\_\_\_\_ COUNTY \_\_\_\_\_

NAME PRINTED \_\_\_\_\_ COMMISSION EXPIRATION DATE \_\_\_\_\_

**CITY COUNCIL STATEMENT**

I HEREBY STATE THAT THIS SUBDIVISION WAS DULY ADOPTED AND APPROVED AND THE OFFER OF DEDICATION FOR STREET AND PUBLIC UTILITY EASEMENT WERE ACCEPTED ON THE BEHALF OF THE PUBLIC. I ALSO DO HEREBY CERTIFY THAT THE CITY OF ATASCADERO CITY COUNCIL DID ORDER THE ABANDONMENT OF THAT PORTION OF RAMONA ROAD AS SHOWN ON THIS MAP AND SHOWN ON THE MAP RECORDED IN BOOK 34C OF MAPS AT PAGE 19A IN THE COUNTY CLERK-RECORDERS OFFICE, AND THE SAME IS HEREBY ABANDONED IN ACCORDANCE WITH GOVERNMENT CODE SECTION 66445(G) WITH THE FILING OF THIS MAP BY THE CITY COUNCIL OF THE CITY OF ATASCADERO ON \_\_\_\_\_, 2022 AND THAT THE CITY CLERK WAS DULY AUTHORIZED AND DIRECTED TO ENDORSE HEREON THE APPROVAL OF THE SAME

\_\_\_\_\_  
LARA CHRISTENSEN DATED \_\_\_\_\_  
CITY OF ATASCADERO  
CITY CLERK

**CITY PLANNING COMMISSION STATEMENT**

THIS IS TO STATE THAT I HAVE EXAMINED THIS MAP AND HAVE DETERMINED THAT SAID MAP SUBSTANTIALLY CONFORMS TO THE TENTATIVE MAP AS APPROVED BY THE CITY OF ATASCADERO ON DECEMBER 8, 2020, AND THE CONDITIONS IMPOSED THEREON.

\_\_\_\_\_  
PHIL DUNSMORE DATED \_\_\_\_\_  
COMMUNITY DEVELOPMENT DIRECTOR  
CITY OF ATASCADERO

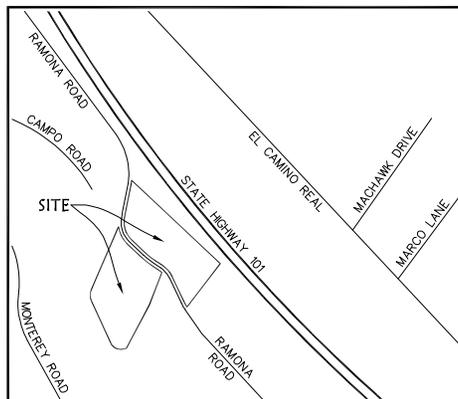
**SURVEYOR'S STATEMENT**

THIS MAP WAS PREPARED BY ME, OR UNDER MY DIRECTION, AND IS BASED UPON A FIELD SURVEY IN CONFORMANCE WITH THE REQUIREMENTS OF THE SUBDIVISION MAP ACT AND LOCAL ORDINANCE, AT THE REQUEST OF THE WIKI AND NICK MILLER IN JANUARY 2020. I HEREBY STATE THAT THIS PARCEL MAP SUBSTANTIALLY CONFORMS TO THE APPROVED OR CONDITIONALLY APPROVED TENTATIVE MAP, IF ANY.

I ALSO STATE THAT ALL THE MONUMENTS ARE OF THE CHARACTER AND OCCUPY THE POSITIONS INDICATED OR THAT THEY WILL BE SET IN THOSE POSITIONS WITHIN ONE YEAR OF THE COMPLETION OF IMPROVEMENTS AND THAT THE MONUMENTS ARE, OR WILL BE SUFFICIENT TO ENABLE THE SURVEY TO BE RETRACED.

\_\_\_\_\_  
DENNIS SCHMIDT PLS 8408

\_\_\_\_\_  
DATED



VICINITY MAP  
NO SCALE

**CITY ENGINEER'S STATEMENT**

I HEREBY STATE THAT I HAVE EXAMINED THE ANNEXED MAP ENTITLED "PARCEL MAP AT 20-0013," THAT THE SUBDIVISION SHOWN HEREON IS SUBSTANTIALLY THE SAME AS IT APPEARED ON THE TENTATIVE MAP AND ANY APPROVED ALTERATIONS THEREOF, AND THAT ALL PROVISIONS OF THE SUBDIVISION MAP ACT AND ORDINANCES OF THE CITY OF ATASCADERO APPLICABLE AT THE TIME OF APPROVAL OF THE TENTATIVE MAP HAVE BEEN COMPLIED WITH.

\_\_\_\_\_  
NICHOLAS D. DEBAR, ROE 89291  
CITY ENGINEER, CITY OF ATASCADERO

\_\_\_\_\_  
DATED

I, JOHN R. SANDERS ACTING ON BEHALF OF THE CITY ENGINEER OF THE CITY OF ATASCADERO, DO HEREBY STATE THAT I HAVE EXAMINED THE MAP SHOWN HEREON, AND THAT I AM SATISFIED THAT THIS MAP IS TECHNICALLY CORRECT.

\_\_\_\_\_  
JOHN R. SANDERS PLS 5812

\_\_\_\_\_  
DATED



**COUNTY RECORDER'S DISCLAIMER**

THE TABULATION, LISTING AND/OR NUMBERING OF ANY SEPARATE DOCUMENTS AUTHORIZED TO BE RECORDED CONCURRENTLY WITH THIS MAP HAVE BEEN PROVIDED BY THE SUBDIVIDER OR BY THE LOCAL AGENCY APPROVING THIS MAP AS SUCH, THE COUNTY CLERK/RECORDER MAKES NO REPRESENTATIONS REGARDING THE ACCURACY OF ANY SEPARATE DOCUMENTS RECORDED CONCURRENTLY WITH AND SHOWN ON THIS MAP.

NOTE: THE FOLLOWING DOCUMENTS AFFECTING THE PROPERTY SHOWN HEREON ARE BEING RECORDED CONCURRENTLY WITH THIS MAP.

- 1. \_\_\_\_\_  
DOCUMENT # \_\_\_\_\_

**RECORDER'S STATEMENT**

FILED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2022, AT \_\_\_\_\_ M., IN BOOK \_\_\_\_\_ OF PARCEL MAPS AT PAGE \_\_\_\_\_ AT THE REQUEST OF DENNIS SCHMIDT.

DOCUMENT NO: \_\_\_\_\_ FEE: \_\_\_\_\_

SIGNED: \_\_\_\_\_ BY: \_\_\_\_\_  
DEPUTY

**PARCEL MAP AT 20-0013**

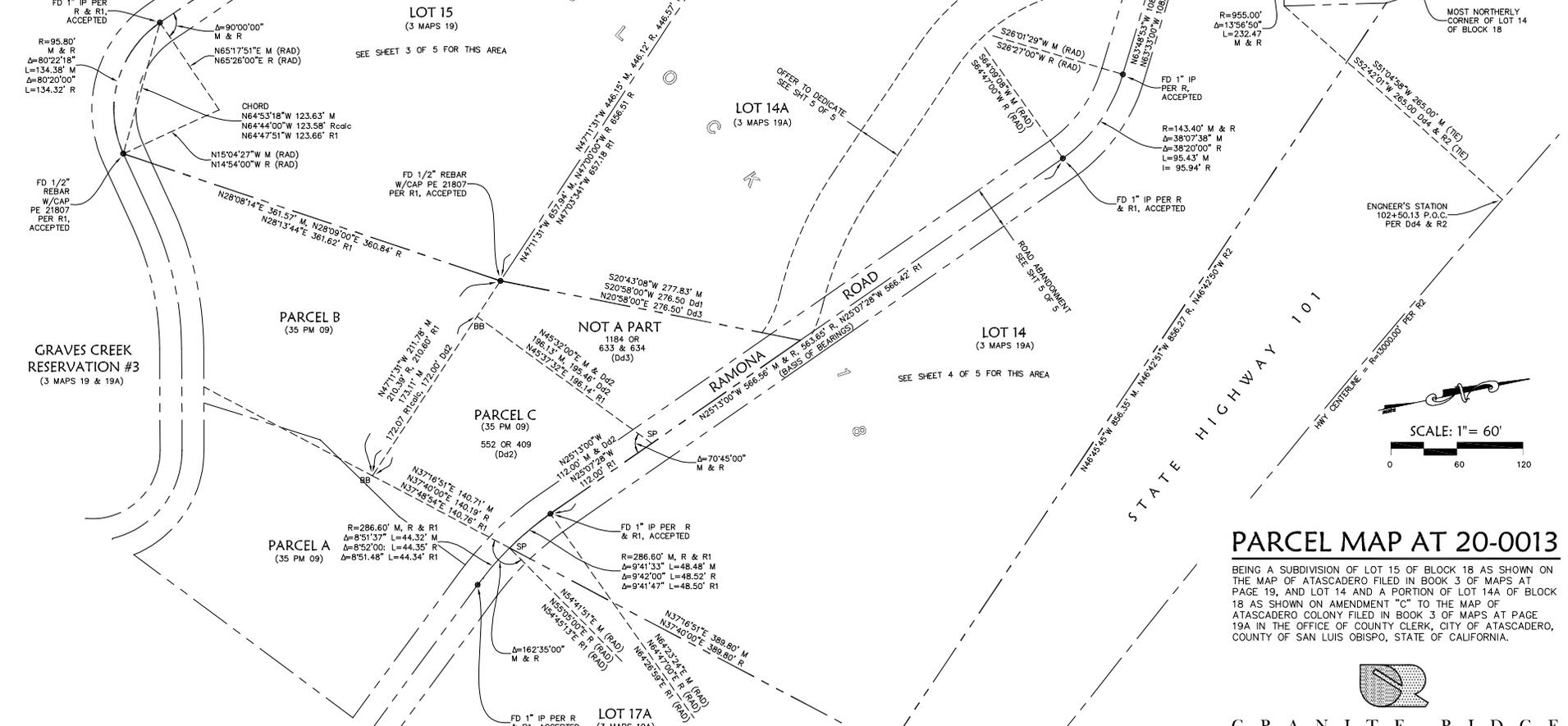
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GRANITE RIDGE  
DEVELOPMENT CONSULTANTS  
8679 SANTA ROSA ROAD ATASCADERO CALIFORNIA 93422  
PHONE 805 835-3582; EMAIL dennis@grainteridgegroup.com  
03 FEBRUARY 2022 SHEET 1 OF 5

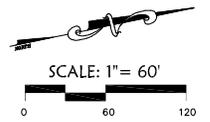
**REFERENCES**

- Found monument as noted
- Set 5/8" rebar and cap, LS 8408
- R 3 Maps 19 & 19A
- R1 35 Parcel Maps 90 (Orton)
- R2 05-SLO-101 PM 45,893 TO 58,897 (Cal Trans Right of Way)
- R3 18 Corner Record 71 (Wilson)
- R4 29 Corner Record 71 (Stewart)
- Dd1 134 Official Records 373 (Parcel Three)
- Dd2 552 Official Records 409
- Dd3 1184 Official Records 633 & 634
- Dd4 1323 Official Records 258
- R Record
- M Measured
- FD Found
- IP Iron Pipe
- BD INT Bearing Distance Intersection
- BB INT Bearing Bearing Intersection
- (RAD) Radial
- Dd Deed



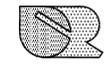
**BASIS OF BEARINGS**

Being between found 1" IP monuments accepted as witnessing the centerline of Ramona Road bearing N25°3'00"W per R and R1.

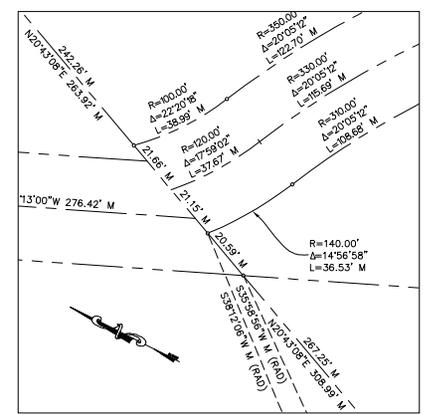
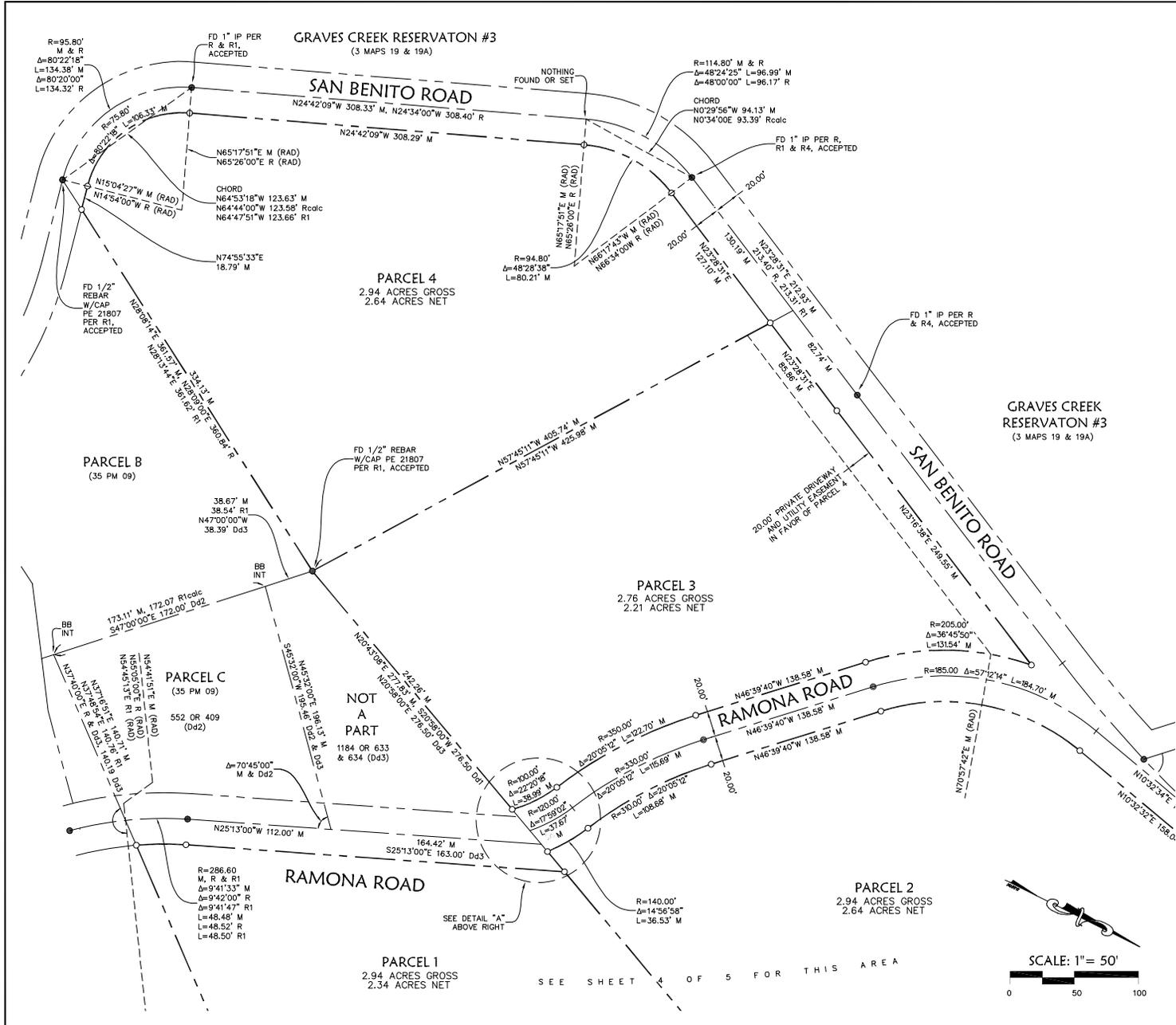


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PHONE 805 835-3582; EMAIL dennis@graniteridgegroup.com  
03 FEBRUARY 2022 SHEET 2 OF 5

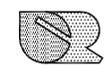


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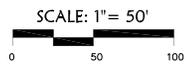
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- M Measured
- FD Found
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- BD INT Bearing Distance Intersection
- BB INT Bearing Bearing Intersection
- (RAD) Radial
- Dd Dead
- Set 5/8" Rebar w/Cap in Street Mon. Well

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03 FEBRUARY 2022 SHEET 3 OF 5

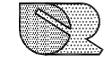


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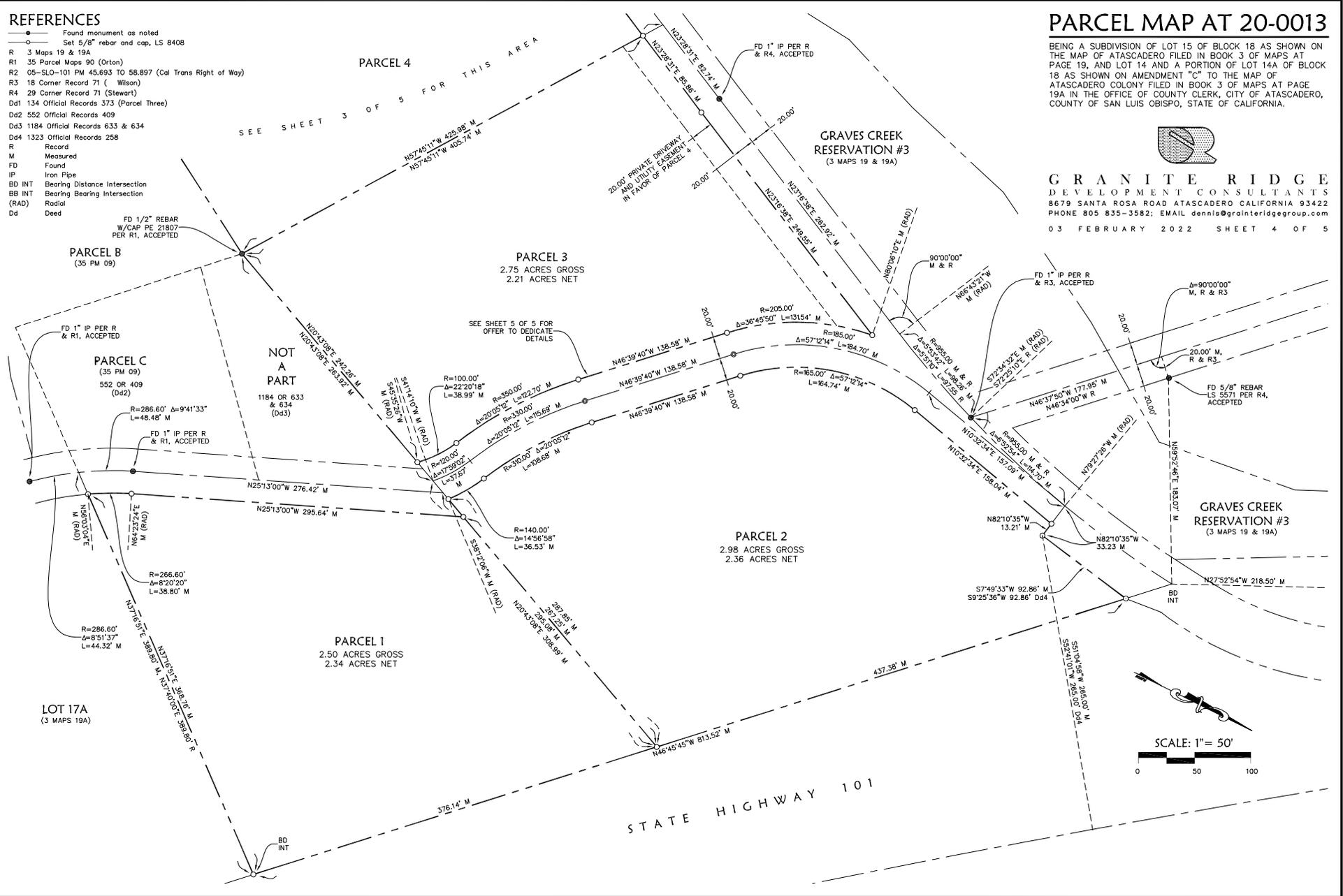
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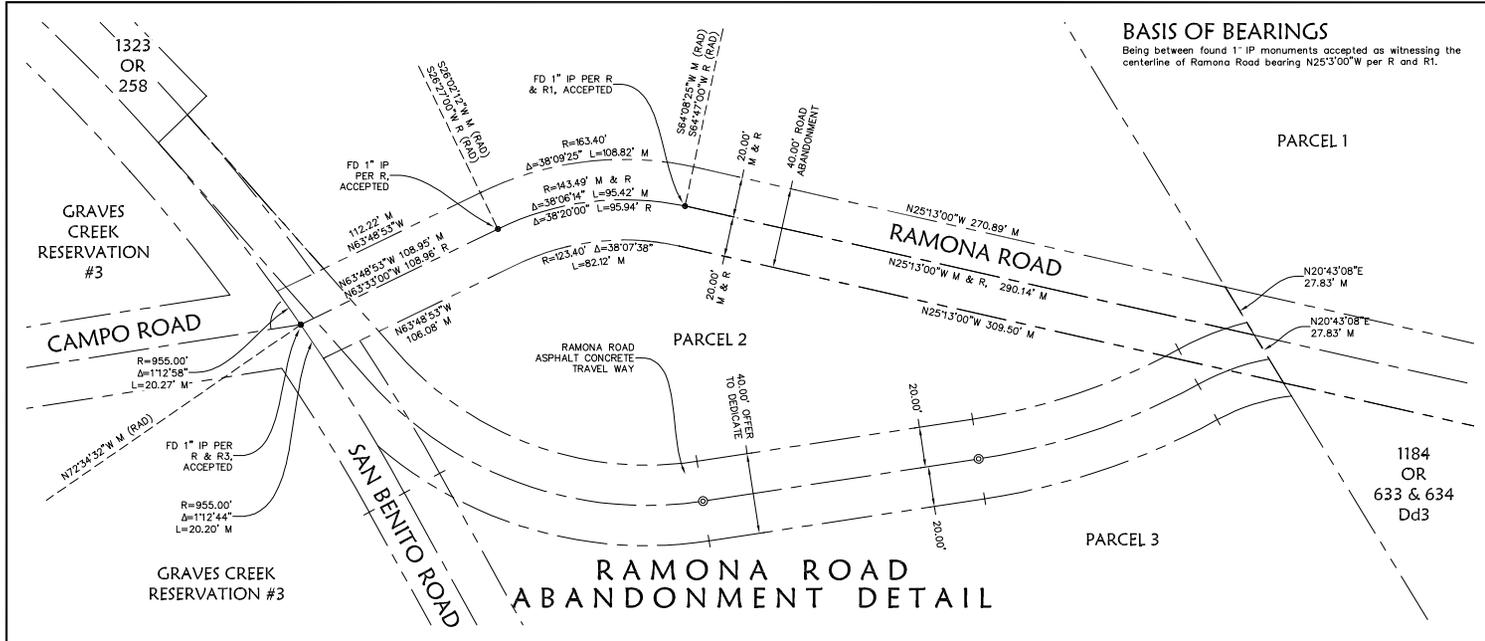
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03 FEBRUARY 2022 SHEET 4 OF 5



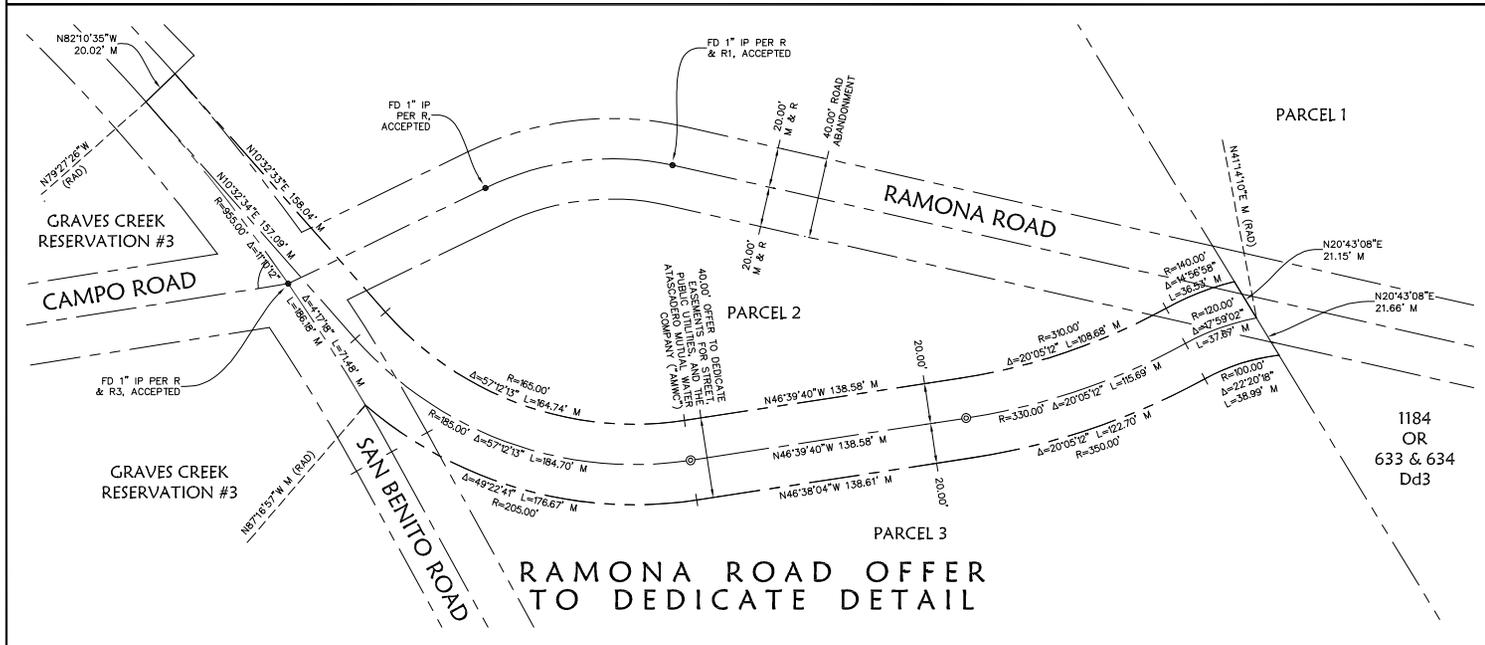


**BASIS OF BEARINGS**  
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**SCALE: 1" = 40'**



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03 FEBRUARY 2022 SHEET 5 OF 5



# **Atascadero City Council**

## **Staff Report – Community Development Department**

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### **Contract Award General Plan Update Project – Phase 2-6 Contract (GPA21-0067)**

#### **RECOMMENDATIONS:**

1. Council authorize the City Manager to amend the contract with MIG, Inc., adding the scope of Phases 2-6 of the preparation of the Atascadero General Plan Update at a cost of \$1,072,257 bringing the total contract cost to \$1,115,273.
2. Authorize the Director of Administrative Services to appropriate an additional \$141,800 in general fund reserves for the General Plan Update.

#### **DISCUSSION:**

The City's existing General Plan was adopted in 2002 and is ready to be updated to accurately reflect our community vision and values and forecast growth and policy objectives through 2045. On December 14, 2021 the City Council authorized the execution of a contract with MIG, Inc. for the preparation of the Atascadero General Plan Update. The contract award was for all six (6) phases of the General Plan Update (an estimated \$900,000 - \$1,500,000 contract), however only the scope and price of phase one was determined at that time. Because each City's challenges, opportunities, goals and community participation, of the General Plan Update process are unique, the scopes of Phases 2-6 were to be determined after the public scoping meeting and as a part of the work in Phase 1.

On January 28, 2022 a joint City Council and Planning Commission Meeting was held to discuss:

#### Looking ahead:

- What are the greatest assets of Atascadero that make the community special and unique?
- What are the most pressing issues Atascadero faces today that will shape decisions for the next 15-20 years and beyond?

Community engagement:

- What guiding principles should shape the community engagement process?
- What types of community engagement activities, platforms, and/or partnerships have worked well in the past that should be included or built upon for the General Plan Update?

Roles and responsibilities:

- How would the Council and Commission like to be involved in the General Plan Update?

Process and desired outcomes:

- What level of economic and/or fiscal analysis would be helpful to inform community and Council policy discussions
- Would the City like to use the updated General Plan to help streamline future development projects that are consistent with new policy direction?
- What is the desired final format for the General Plan: a printed copy and/or interactive website?

Following the January 28<sup>th</sup> joint study session, staff and the consultant have refined the scope of work for Phases 2-6 based on the input received. The scope was refined to include the City's preferred approach to public outreach, level of analysis, key areas of focus, desired elements and final deliverable. Staff is seeking Council authorization to amend the contract adding the refined scope language and budget to the contract as planned.

The refined scope of work can be found as Attachment 1, and includes 6 phases with a total budget of \$1,110,063 which is consistent for this type of work. The contract amendment for the General Plan update will include work for Phases 2-6 as follows:

**Phase 2 Discovery and Visioning- Budget of \$305,032**

Phase 2 work is devoted to gathering data and input that will be the backbone of the General Plan update. Work will include setting up branding of the project, communications portals and group discussions. This phase will also include numerous technical studies and mapping:

- Base Mapping Land Use and Community Form Technical Study
- Fiscal Conditions
- Biological Resources Technical Study
- Cultural Resources Technical Study
- Traffic and Mobility Technical Study
- Noise Technical Study
- Infrastructure Technical Study
- Parks and Recreation Technical Study
- Economic Conditions Technical Study
- Environmental Justice and Equity Technical Study
- Existing Conditions and Policy Implications Atlas

As discussed at the January 28<sup>th</sup> scoping meeting, this phase will include an expanded fiscal analysis of the General Plan Alternatives. This additional detail will allow the

community and City Council to understand the potential financial impacts of for different types of residential development and commercial developments, including both short-term impacts and the longer-term ramifications. This will help inform future land use scenarios, as it broadens our understanding of service and infrastructure costs associated with various land use scenarios, especially the impacts tied to each type of residential dwelling unit. Most dwelling units result in a fiscal impact to the City; however, this fiscal impact should identify the break-even point of a residential development and the potential balance of associated fiscal neutrality.

Finally, Phase 2 includes the critically important first community engagement series- *Vision for the Future*. During this community engagement series, the team will be leading a series of community engagement activities designed to establish draft General Plan Vision and Guiding Principles that will include Atascadero's vision for future growth and change, and its identity. As part of this process the consultant will prepare an Areas of Stability and Change that will illustrate areas that have the potential to change in the future, as well as identifying neighborhoods where not land use policy changes are anticipated.

### **Phase 3 Exploring Alternatives- Budget of \$152,600**

This phase includes development of the preliminary General Plan alternatives, analysis of the alternatives and refinement and finalization of a preferred General Plan alternative. Using Phase 2 analyses and Community input gathered to date, the consultant team will map areas of stability and change, potential land uses, mobility enhancements, sustainability principles, and community safety strategies.

In addition to a comparative summary of each scenario, the consultant will produce highly graphic illustrations which may include for example, relative water consumption, vehicle miles traveled, energy use, or other indicators of interest. Key components of the Alternative Summary will include the following information and analysis:

- Fiscal Impact Analysis of Alternatives
- Impacts on Public Service Expenditures
- Impacts on General Fund Revenues
- Net Fiscal Impact on General Fund
- Safety, Resiliency and Sustainability Impacts

A robust second round of community engagement will focus on “Exploring the Possibilities” of each alternative and will provide input needed to refine and select the preferred alternative. Engagement opportunities include targeted stakeholder outreach, a community workshop, staff meetings and multiple Planning Commission and City Council Study Sessions.

Based on input received, the Consultant Team will develop a Preferred Alternative that will serve as a basis for the Draft General Plan. The Preferred Alternative will include a refined Vision supported by a series of transformative strategies—key public projects and catalytic site developments that will spur the first wave of investment necessary to gain momentum for increased housing and employment opportunities in Downtown.

The Preferred Alternative will be presented as a series of highly visual posters with concise text, visualizations, mapping, and other graphics.

Phase 3 Optional Tasks:

Optional tasks that can be integrated into Phased 3 if desired are as follows:

- Youth Design Charrette (\$9,020) - This option would include a charrette in coordination with high school teachers to provide an opportunity for students to work on one or a series of urban design challenges that are being considered during the General Plan Update project. Student groups would study the challenges (e.g., new parkland, street design, etc.), prepare concepts and solutions, and present their ideas.
- "Plan Van" Vinyl Wrap Design (on top of a City fleet vehicle) - \$3,350 - The consultant team would design and coordinate the installation of a wrap that would go around an existing City fleet vehicle that can be used to advertise the General Plan Update project and include the project website link.
- Social Media Program (led by the Consultant team) - \$16,200 – The consultant team would take the lead on developing a project Facebook page and Twitter feed. This program would include regular update posts to both sites and monitor community discussions.

**Phase 4 A Plan for Atascadero 2045 - Budget of \$411,526**

Phase 4 consists of the organization and construction of the Draft General Plan Document and subsequent CEQA Analysis. Based on the technical analysis, input received during earlier phases, and State legal requirements, the Administrative Draft General Plan will reflect expressed community values, such as economic vitality, sustainability, safe and healthy communities, connectivity, fiscal sustainability and education throughout each element. The updated General Plan will likely include the following chapters or “elements” and will be organized and titled based on direction provided:

- Introduction
- Land Use and Community Form Element
- Circulation Element
- Conservation and Open Space Element
- Noise Element
- Safety Element
- Environmental Justice Element
- Economic Development Element\*
- Public Services and Infrastructure Element/Fiscal Sustainability Element\*
- Implementation Plan

\* These are optional elements that can either be stand alone elements or topics and areas that are addressed in one of the required elements.

MIG will prepare the Public Draft General Plan for public review and will conduct a third series of public engagement. The third round of meetings will include an internal staff

meeting, discussions with community groups and residents, a community open house and another round Study Sessions with Commission and Council. The purpose of the meetings is to solicit input from the community on the draft Plan document in engaging, interactive formats.

Next, the environmental team will begin the CEQA process by completing an Initial Study (IS) checklist and narrative to appropriately focus the topical contents of the General Plan Environmental Impact Report (EIR). The focus topics that may be included in a program-level Draft EIR (that will streamline future entitlements and CEQA work) include:

- Aesthetics
- Air Quality
- Biological Resources
- Cultural and Historic Resources
- Energy Use/Conservation
- Geology and Soils
- Greenhouse Gas Emissions (GHG)
- Hazards and Hazardous Materials
- Hydrology and Water Quality
- Land Use and Planning
- Noise and Vibration
- Population and Housing
- Public Services (including recreation)
- Transportation and Traffic
- Utilities and Service Systems

This task will be concurrent and collaborative with the General Plan update process. Environmental topic areas and potential CEQA defined impacts will be aligned with potential new policies and amendments. General Plan policies will address environmental topics such as sustainability, efficient land use, and connectivity, which in turn will avoid or reduce potential impacts. The EIR will help inform the update process while providing mitigation to help reduce potentially significant impacts. The City Council will have the ability to make recommendations on the final suggested EIR language and mitigation.

Phase 4 Optional Tasks:

Optional tasks that can be integrated into Phased 4 if desired are as follows:

- Project Level EIR Analysis - \$100,000 - The suggested work scope includes an EIR that will evaluate potential zoning changes, circulation changes, and citywide growth and policy updates associated with a new land use plan and a new circulation plan. The City Council discussed the idea of developing the EIR in a way so it can go a step further and streamline specific development projects by incorporating them into the update. However, specific development project level environmental review is not currently included in the scope, but could be an optional task. However, it is difficult to determine the exact scope and budget for this approach since we do not know what specific areas/sites would be included in the more detailed analysis. We would have this information identified as part

of the General Plan Preferred Alternative. Given these factors, if the City Council would like to include this level of analysis, we recommend including a contingency amount of \$100,000 in the budget. The actual scope and process would be determined once the preferred General Plan Alternative is identified and sites that would receive the more detailed analysis are confirmed. City staff would need to authorize any use of that contingency.

- Emergency Operations/Multi-Hazard Mitigation Plan - \$35,290 - As a sub task of the General Plan Update, the City Council may include the task of completing an update to the City's emergency operations plan. The City's Safety Element typically includes policies that require the future development of this plan, however the implementation of this policy could also occur in conjunction with the formulation of the general plan.

### **Phase 5 Celebrate Our Future - Budget of \$98,728**

The consultant team will prepare an Administrative Final EIR for City staff review and based on comments will prepare a Final Draft EIR. Two Planning Commission and Two City Council public hearings will be held to present, discuss, and receive comments on the Draft General Plan and Final EIR. The first hearings will provide an opportunity for public officials to receive formal public comments, ask questions to the consultant team, and begin deliberations. The second hearings will provide an opportunity to continue the discussion and deliberations, where decision makers can provide a formal recommendation on the Draft General Plan and EIR.

An online ePlan is now scoped as the final version of the General Plan document under Task 5.4. The scope was then refined for several other tasks to assume the draft General Plan document is a nicely formatted Word file that will eventually become the online ePlan. This version of the plan will be both printable and usable as a linked, easy to navigate online document.

### **Phase 6 Ongoing Team Coordination - Budget of \$52,746**

This phase accounts for approximately two years of ongoing project coordination calls and meetings (twice a month for 24 months) as well as project management, administration and budgeting. Additionally, this task accounts for subconsultant coordination and management.

### **What's Next**

Upon refinement and finalization of the work program, the City Manager will execute authorization of the scope and budget for Phases 2-6 with MIG Consulting and begin with Phase 2 – Discovery and Visioning.

A preliminary project webpage has been established so that members of the community can stay up to date on the project timeline and progress: [www.atascadero.org/GeneralPlan2045](http://www.atascadero.org/GeneralPlan2045).

Staff requests that City Council provide direction on any preferred optional tasks as listed below. Any of these optional tasks can be integrated into the final contracted scope of work.

- Youth Design Charrette \$9,020
- "Plan Van" Vinyl Wrap Design (on top of a City fleet vehicle) \$3,350
- Social Media Program (led by the Consultant team) \$16,200
- Project Level EIR Analysis \$100,000
- Emergency Operations/Multi-Hazard Mitigation Plan \$35,290

At this time, the project will be funded through the City’s General Fund, however, City staff is continuing to seek grants to assist with this effort. The City has budgeted \$450,000 for fiscal year 2021-22 and \$635,000 for fiscal year 2022-23, for a total allocated budget of \$1,085,000. The total MIG contract (not including optional tasks) is currently scoped at \$1,115,273. In addition, like all City projects it is wise to add some budgeted contingency funds to ensure funds are available for unexpected tasks, City supplies, advertising, or other costs not included in the MIG contract. An additional appropriation of \$141,800 in general fund reserves will be necessary to cover the full costs and the MIG contract and a 10% budget contingency.

**FISCAL IMPACT:**

Authorization to approve the scope and cost of Phases 2-6 of MIG contract for the preparation of the Atascadero General Plan Update will result in the base expenditure of \$1,072,257 of general funds. Any additional optional tasks as outlined in this staff report that are authorized by Council will be in addition to the base expenditure of \$1,072,257.

<b>ESTIMATED EXPENDITURES</b>	
Phase 1 (Previously authorized)	\$ 43,016
Phases 2- 6 (Requested authorization)	
Phase 2- Discovery & visioning	\$ 305,032
Phase 3- Exploring Alternatives	152,600
Phase 4- A Plan for Atascadero 2045	411,526
Phase 5- Celebrate Our Future	98,728
Phase 6- Ongoing team Coordination	52,746
Design Support	51,625
Subtotal Phases 2-6	<b>1,072,257</b>
Total MIG Contract Award	1,115,273
Contingency -10%	111,527
Total Estimated Expenditures	<b>\$ 1,226,800</b>

<b>FUNDING SOURCES</b>	
Budgeted General Funds	\$ 1,085,000
Additional Appropriation from General Fund Reserves	141,800
Total Funding Sources	<b>\$ 1,226,800</b>

**ALTERNATIVES:**

Council may direct staff to modify the scope of work as appropriate and include any optional tasks as desired.

**ATTACHMENTS:**

1. MIG, Inc. full scope of work for the General Plan Update Project
2. MIG, Inc. budget for the General Plan Update Project
3. Project Scoping Meeting Notes from January 28,2022 Joint Study Session



CITY OF ATASCADERO GENERAL PLAN UPDATE

# **PROPOSED WORK PROGRAM FOR PHASES 2-6**

Updated March 16, 2022

## WORK PROGRAM SUMMARY

The MIG Team is excited to present the following Draft Work Program for Phases 2-6 of the Atascadero 2045<sup>1</sup> General Plan Update. We developed this work program based on our understanding of the issues and opportunities facing the City and community and discussions with City staff. We envision the following remaining phases and initial components of the program.

### **Phase 2: Discovery and Visioning**

To provide the General Plan team and public with a common foundational understanding of conditions shaping decisions about the future, the MIG Team will undertake a series of technical studies that will be compiled in an Existing Conditions and Policy Implications Atlas. The Atlas will be highly graphic and will report not just existing conditions but also associated opportunities and policy implications.

We will initiate the public engagement process with Visioning—asking residents, business owners, visitors (who help support the economy), and other stakeholders to share their ideas for making Atascadero the city they want it to be. The activities will be high tech and high touch, recognizing that while we live in an increasingly digital engagement world, people still want to get together in person to share ideas. We will produce a Vision and Guiding Principles document that will establish the General Plan foundation.

### **Phase 3: Exploring Alternatives**

Building upon the Existing Conditions and Policy Implications Atlas, the Vision and Guiding Principles document, and community ideas and input, the MIG Team will develop—in close coordination with City staff—a Concept Alternatives Summary to highlight an overall vision for Atascadero and for special/unique areas. Concepts will be developed to show options for mobility (possibly including roadway network, bicycle/pedestrian systems, alternative vehicle systems), land use, community design, and other policy considerations. This may include identifying specific focus areas expected to be the primary locations of change. The document will communicate technical and policy issues in a straightforward manner for sharing with community members and

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<sup>1</sup> We suggest using 2045 as the horizon year since it coincides with the planning horizon for the upcoming San Luis Obispo County Regional Transportation Plan. However, the City may choose to identify an alternative horizon year.

decision-makers. The Planning Commission and City Council will use this information to recommend the Preferred General Plan Alternative.

#### **Phase 4: A Plan for Atascadero 2045**

Based on decision-maker direction in Phase 3, the MIG Team will prepare the new General Plan within the element structure approved by City staff. City staff will review and provide comments on the complete Community Draft General Plan. The General Plan will be highly graphic, focused on action, and formatted so it can be easily turned into an interactive online ePlan.

We will also prepare the Program EIR in Phase 4. The Program EIR will serve two important functions: (1) as the document required by law to analyze project impacts and (2) as an economic development tool to streamline CEQA review of future major development projects (both public and private). We plan to prepare a Program EIR that analyzes reasonable buildout at the horizon year, thus providing clearance for projects consistent with the General Plan.

#### **Phase 5: Celebrating Our Future**

The public review and hearing process for the Atascadero 2045 General Plan will celebrate the community's earnest work to create a visionary, practical plan. We will hold community events (in person or virtually), two Planning Commission Public Hearings, and two City Council Public Hearings (including the adoption hearing). These sessions will allow for interactive discussions and identification of any "tweaks" to be considered to the General Plan before it is formally adopted by the City Council.

#### **COVID Program Management and Virtual Engagement Approach**

As the situation around the novel coronavirus (COVID-19) continues to evolve, the MIG Team recognizes it is essential to adapt and move forward with community engagement efforts for critical planning projects. Although in-person meetings and events may be discouraged, our team members are skilled in the use of virtual project management tools that promote team and client collaboration when in-person meetings are not feasible. MIG uses a wide range of platforms to respond to client needs and preferences, and we will adjust our process accordingly to transition any of the in-person events listed in our Draft Work Program to digital and virtual engagement events.

MIG suggests combining the use of video conferencing (such as Zoom) with a digital white board (such as Mural) to manage project activities and team member contributions in virtual settings. Multiple digital white boards with managed access can be created to reveal and demonstrate the full array of technical assistance activities being provided. The ability to create a snapshot of the results of each work session in the form of a pdf file provides transparency and documentation while reducing the effort spent on interim summaries and meeting notes. Additional virtual tools, such as Loom, which allows for the quick and easy creation of short video files, can be shared with technical assistance recipients to provide direction and explanation as needed.

## PHASE 2

### DISCOVERY AND VISIONING

#### Task 2.1: Notifications, Surveys and Translation Services

MIG will develop the following notifications and engagement tools to reach a broad spectrum of the community to encourage them to be active participants in the project (which can be refined based on discussions with City staff):

- **Project Branding:** MIG will develop a project brand that will include naming, logo design, brand identity, icons, color scheme, message, and tagline that will be used throughout the General Plan Update process to identify the information presented as associated with the City's efforts to facilitate housing and development downtown. The branding will be designed to resonate with the community the importance of the evolution of Atascadero (e.g., "Atascadero Tomorrow," "Atascadero on the Move," "Our City, Our Plan," etc.).
- **Project eNewsletters and eBlasts:** MIG will develop three electronic newsletters (eNewsletters) to inform the community of project progress and provide notice of opportunities for community input. Each eNewsletter will be highly visual and include relevant, interesting information for the community. In addition, MIG will prepare a regularly send out project email blasts (eBlasts) to people who signed up through existing City databases and meeting sign-in sheets.

- **Social Media Updates:** MIG will prepare content for regular social media postings about the project and submit them for distribution through the City of Atascadero's existing Facebook and Twitter accounts, and other community social media pages (via reposts). The budget provides for MIG to prepare content for up to 20 social media postings during the project.
- **Online Engagement:** MIG will prepare three online engagement components that coincide with each round of stakeholder and community meetings. These qualitative surveys will be developed using MIG's proprietary survey tools that are backed by decades of social research. This suite of tools allows us to fully customize the surveys, so they gain the most accurate input available. MIG will prepare succinct summaries of each survey (e.g., results graphs/tables and listings of all comments).

### **Task 2.2: Interactive Project Portal**

MIG will create a stand-alone General Plan Update website that will contain current information on the status of the project, downloadable documents and presentations, and a method to send information and input to appropriate project staff. The website will be seamlessly linked to the City's main website but will utilize MIG's suite of web-based tools, known as TownSquare™. MIG will provide reporting of site statistics and network performance as requested by City staff. This will be an interactive website that can be preprogrammed for a variety of devices and settings.

The website will be used throughout the General Plan Update process or longer as needed and mutually agreed to. Once the project is completed, MIG will send the City electronic copies of all website materials and content to be reloaded on the City's website. MIG retains ownership of all underlying software and publishing tools. Reporting of site statistics, usage and network performance will be provided at the request of City staff, but no more frequently than quarterly.

### **Task 2.3: Council, Commission, and Affinity Group Discussions**

MIG will conduct one-on-one interviews with City Council members, City Commissioners, and community affinity groups. These discussions can be conducted through a combination of in-person meetings or digital format such as Zoom. City staff will be responsible for contacting the interviewees, coordinating interview times, and securing a meeting

room to hold the interviews. MIG assumes interviews with individuals and groups will be conducted over two full days at a location in the city and/or digital interviews not to exceed the budgeted allowance. Following the conclusion of all interviews, MIG will prepare a summary memorandum of key findings and major take-aways.

#### **Task 2.4: Base Mapping**

MIG will collect and review available GIS data from the City, including existing land use, General Plan land use designations, zoning, existing dwelling units per parcel, existing jobs or non-residential square footage per parcel, street centerlines, and County Assessor data. Building footprint and height attributes are also desirable, if available. MIG will also utilize Urban Footprint both to support base mapping data and as an analytical tool. (MIG was a partner beta-tester of Urban Footprint with Calthorpe Associates.) All information will be assumed to be accurate and up to date. MIG, in coordination with the City, will also define and format a series of base maps for use throughout the General Plan Update process. These base maps will include existing conditions information, such as existing land use, zoning, circulation, and environmental information. We will ensure all maps have a uniform style, legend, and title block.

At the culmination of the project, MIG will provide the City with the GIS maps and associated files developed during the process. All GIS data and mapping prepared for the General Plan will be developed consistent with City protocols and data formats to ensure easy integration into the City's information system upon project completion. City staff will be responsible for providing GIS data, coordinating on formatting and metadata protocols, and reviewing and providing feedback on the base maps.

#### **Task 2.5: Technical Studies**

The MIG Team will prepare a series of technical studies to summarize existing information provided by the City and other public agencies. These technical studies will provide the dual purpose of identifying planning and economic development opportunities and establishing the environmental baseline for the Program EIR.

- **Land Use and Community Form Technical Study.** MIG will prepare a land use and community form analysis that describes, illustrates, and provides a snapshot of existing built form

conditions in Atascadero. Based upon field observation and documentation, this statement will visually categorize the open space, streetscape, district, node, and building types that form the community. An Atascadero “transect” will be developed that visually describes the environmental types and logics observed. Utilizing GIS to understand existing distributive patterns of environmental design factors in relationship to existing land uses and circulation patterns, preliminary opportunity and change areas will also be identified. The statement will conclude with a summary of observations and considerations that will help shape the urban design alternatives and policies of the General Plan.

- **Fiscal Conditions and Implications of Land Use Decisions.** EPS will conduct the necessary research and analysis to guide the preparation of a range of land use alternatives to support a fiscally sound land use plan and inform long-term economic development strategies. This will include an analysis of existing economic, demographic, and social conditions in Atascadero to create a starting point for economic opportunities and alternatives.

As a first step, EPS will review the City’s existing budget documents and conduct interviews with City staff to identify the City’s current fiscal structure (key revenues and expenditures), the City’s current use of fiscal policies and tools, as well as key fiscal issues the City is currently facing. EPS will provide a quantitative comparison of net annual fiscal impacts for several different housing products (apartments, moderate single family residential, high end single family residential, condo), and commercial developments in order to inform development and analysis of General Plan Alternatives. These quantitative comparisons will broadly examine both the short term fiscal impact and long term fiscal impact of the land uses selected.

*Impacts on Public Service Expenditures*

*EPS typically relies on per-capita estimates, City budgets and case study research to establish public service costs. Per-capita estimates most commonly are relied on to forecast costs for departments that provide general government services, planning services, and communitywide services. Case study-based analyses are applied to other city services such as police and public works. As part of the case study analyses, EPS may incorporate calls-for-service data from the police department and cost-per-road-mile data for road*

*maintenance. The appropriate methodologies in each case will depend on available City data and discussions with individual City service providers.*

#### *Impacts on General Fund Revenues*

*Like the expenditure analysis, EPS typically employs both per-capita, budget and case study-based methods for estimating General Fund revenues. Sales tax, property tax, and transient occupancy tax (TOT) revenues are typically the most significant sources of General Fund revenue. The analysis will devote effort to evaluating major City revenue sources influenced by land use. Property tax revenues will reflect anticipated real estate development deliveries, property value assumptions, and the City's property tax allocation factors. Other revenue estimates, such as charges for service, franchise fees, and licenses and permits will be based on the City's current revenue performance in these areas.*

#### *Net Fiscal Impact on General Fund*

*Based on the data obtained and analysis conducted under the prior subtasks, EPS will compare General Fund revenues and expenditures and calculate the net fiscal impact of each Land Use. This will include a description of a fiscal analysis that quantifies how much it costs the City of Atascadero to serve housing products of all types (single family homes, townhouses, apartments, etc.) and where the true jobs/housing balance is to remain fiscally sound (with respect to realistic buildout projections and providing services to our residents) with or without having a CFD/Mello-Roos tax on new development.*

As a second step, EPS will provide the information and data necessary to understand the fiscal implications and tradeoffs of key land use decisions and inform economic development strategies. Like other California cities, it is assumed that key issues will include, but not be limited to, a range of short- and long-term considerations, including: (1) ongoing fiscal impacts of COVID-19; (2) pension obligations and their increasing impact on City General Funds; (3) the broader trend of retail store contraction and the rise of e-commerce; and, (4) the need to continue to provide adequate public services.

- **Biological Resources Technical Study.** SWCA will prepare a biological resource inventory and associated maps based on available biological information related to special-status plants, animals, habitats, and aquatic resources with the planning area.
- **Cultural Resources Technical Study.** SWCA will prepare a cultural resources evaluation describing archaeological, historical, and cultural resources that influence planning and contribute to Atascadero's character. In particular, SWCA will address historical resources within the Downtown area and other more historic parts of the City. This information will be summarized in narrative and mapping.
- **Traffic and Mobility Technical Study.** CCTC will prepare a Traffic and Mobility Technical Study based on available information, input from the City staff and MIG Team, and knowledge of the local area, describing existing systems and services and identifying key issues and planning considerations that will be used to inform the Circulation Element update, including potential conflicts between LOS-based policies and potential VMT-based policies. These considerations will be stratified by MIG based on census data indicators for the City, including income level, race, and other socioeconomic focus characteristics identified by the City in support of the Environmental Justice component of the General Plan.
- **Noise Technical Study.** Ambient will prepare a noise report that describes the existing noise environment in Atascadero. Ambient will conduct up to 30 short-term (i.e., 10-15 minutes) and up to 3 long-term (i.e., 24-hour) noise monitoring surveys. To the extent possible, survey locations will correspond to previously monitored locations and other noise concern areas in Atascadero. The purpose of this monitoring is to describe the existing noise environment and particularly at sensitive receptor locations, evaluate if and how the noise environment has changed since the last General Plan update, and evaluate potential changes in noise levels associated with plan implementation. The report will include traffic noise modeling using the transportation noise model for up to 30 road segments (including US 101). Projected existing average-daily noise contours for up to five major transportation corridors will be depicted graphically within the report.

- **Infrastructure Technical Study.** BKF will conduct an overview of infrastructure conditions based on available master plans and interviews with responsible City departments and outside agencies. Based on available information, we will review area infrastructure supply, transmission, distribution facilities. Utility infrastructure will include wastewater treatment plant capacity, transmission, and local distribution systems; water capacity and distribution systems; stormwater facilities; and gas, electric, and communication facilities. We will interview utility providers to determine the utility's age and serviceability; reliability; and suitability for reuse. Additionally, based on the on-going issues with fires, BKF will review the City's water system to determine if there are deficiencies or issues in the ability to fight fires.

BKF will also review the capacity of the water, wastewater, and drainage overall systems to support anticipated growth. This analyses will be at a district level and will not address modeling or analyses of individual segments of pipeline. We have not anticipated preparing a Water Supply Assessment as part of the analyses. BKF will also investigate options related to green infrastructure and provide a menu of potential green infrastructure ideas. These will include stormwater treatment, rainwater harvesting, permeable pavements, etc. We will identify potential areas where green infrastructure could be incorporated into the City's infrastructure. Lastly, we will review areas in the city historically been prone to flooding. This includes a review of the current FEMA analyses and then discuss potential improvements to improve the flooding. Past studies have discussed improvements upstream of the City to redirect or detain flows.

- **Parks and Recreation Technical Study.** MIG will map current park resources and the accessibility of neighborhoods to parks, identifying those that do not have ¼-mile or ½-mile walking or biking access.
- **Environmental Justice and Equity Technical Study.** MIG will prepare an Environmental Justice and Equity Technical Study that will include a comprehensive citywide analysis regarding environmental pollution exposure and related health and wellness indicators, such as access to healthy foods, sensitive receptors, and access to medical services. Using CalEnviroScreen 4.0 and other available resources, we will map disadvantaged

communities and dig into the social, economic, and pollution data sets. We will review other environmental and health databases and resources, to identify indicators measuring citywide inclusivity and equity, as well as underlying socio-economic variables including home purchasing power, unemployment rate, educational attainment, and poverty levels.

Each Technical Study will be prepared in Word and include key findings (up front), a summary of the current regulatory context, narratives, graphics, tables, and maps. The MIG Team will submit administrative drafts of each study to the City for staff and STAC review. We will prepare a second, final version of each study that reflects input and comments from City staff and the STAC.

### **Task 2.6: Existing Conditions and Policy Implications Atlas**

Based on our review of the data sources itemized above and the technical studies, MIG will prepare a comprehensive report presenting conditions that will influence the planning process. The report will be a highly illustrative and informative Existing Conditions and Policy Implications Atlas based on GIS mapping tools. The atlas will comprehensively and concisely summarize conditions today that point toward the General Plan vision and policy to be prepared. It will also serve as the EIR's existing setting sections. The atlas will be structured around four overarching themes: Land Use and Urban Design, Circulation and Infrastructure, Public Health and Safety, and Sustainability. As its title suggests, the atlas will not just report existing conditions but will also discuss how these conditions shape the planning process. MIG will electronically submit atlas to City staff for review. Upon receipt of single document that consolidates and reconciles all City staff comments, MIG will prepare the final document. The budget allows one round of review.

### **Task 2.7: Community Engagement Series #1 - Vision for the Future**

The first meetings of an internal City technical advisory committee, community groups, and residents will occur after completion of the Existing Conditions and Policy Implications Atlas. The purpose of the meetings is to understand the community's vision of the future of Atascadero and to solicit input on opportunities, issues, and desires for the City. MIG will develop a process, survey, and unique exercises to better understand community preferences regarding Atascadero. MIG will use photo simulations and development prototypes to help identify

preferences, as well as community asset mapping, allowing the community to identify assets or concepts for improving the area. The meetings and workshops will provide input regarding community interests that will help in the development of the Vision, Guiding Principles, and initial Concept Alternatives. MIG will prepare all meeting agendas, presentations, materials, and exercises. This round of community meetings and events will include the following:

- **Staff Technical Advisory Committee (STAC) Meeting #1.** MIG will meet with the STAC to present and obtain feedback on the Existing Conditions and Policy Implications Atlas. This will include a facilitated discussion to review and confirm all content and data is accurate, and the presentation of opportunities is correct. MIG will record these comments and ideas on a large wallgraphic.
- **Targeted Outreach #1.** MIG will conduct focused outreach to key community groups to engage them on the General Plan Update process and opportunities for Atascadero. This will include direct calls and discussions with stakeholders to fully understand their desires and concerns. This will provide an opportunity to discuss major issues and opportunities directly with stakeholders during more casual conversations. The budget for this task assumes MIG reaching out to 20 community groups.
- **Community Workshop #1.** MIG will prepare materials for and facilitate a community workshop that builds upon all input received to date (either in-person or virtual). MIG will conduct special outreach to a long list of residents and stakeholders to garner strong community interest. The agenda for the workshop would be to discuss and confirm the long-term vision for Atascadero, and discuss community assets, opportunities, and challenges. MIG will provide three to four staff for this workshop to facilitate, record comments, and assist with break out groups and logistics. MIG staff will record comments on a large wallgraphic as a key tool to assist with meeting facilitation.

### **Task 2.8: Draft Vision and Guiding Principles**

Based on STAC and community feedback received during Community Engagement Series #1, MIG will develop a series of draft General Plan Vision and Guiding Principles that will include Atascadero's vision for future growth and change, and its identity. As part of this process and

based on ongoing outreach meetings and discussions with City staff, MIG will prepare an Areas of Stability and Change Map that illustrates areas that have the potential to change in the future, as well as identifies neighborhoods and districts where no land use policy changes are anticipated. The draft Community Vision and General Plan Guiding Principles will be brought back to the STAC for confirmation and will be tested with the community during the first workshop. MIG will electronically submit the Vision and Guiding Principles document to the City for staff review. Upon receipt of a single document that consolidates and reconciles all City staff comments, MIG will prepare the final document. The budget assumes one round of City staff review.

### **Task 2.9: Planning Commission Study Session**

MIG will meet with the Planning Commission in a study session to present and receive feedback on the Existing Conditions and Policy Implications Atlas, and ideas and feedback from Community Engagement Series #1. This important session will: (1) help to ensure that there is alignment on the emerging vision and guiding principles for the General Plan and (2) allow the Planning Commission to provide feedback that will go directly into the plan development. MIG will provide two staff and a PowerPoint presentation for this study session. Alternatively, this study session can be held as a joint working session with the Planning Commission and City Council.

### **Task 2.10: City Council Study Sessions (2)**

MIG will meet with the City Council two times during this phase. The first meeting will be to discuss the goals and process for this phase and to provide preliminary input. The second meeting will be to present and receive feedback on the Existing Conditions and Policy Implications Atlas, review ideas and feedback from Community Engagement Series #1, and provide refined feedback and direction. These important sessions will: (1) help to ensure that there is alignment on the emerging vision and guiding principles for the General Plan and (2) allow the City Council to provide direction on the General Plan Vision and Guiding Principles. MIG will provide two staff and a PowerPoint presentation for each study session.

### **Phase 2 Deliverables**

- Kick-Off Meeting Agenda, Presentation and Summary (Word/PPT/PDF)

- Project Schedule (InDesign/PDF)
- General Plan Advisory Committee Formation and Organizing Framework (Word/PDF)
- Staff Technical Advisory Committee Formation and Roles (Word/PDF)
- Project Branding Materials, including name, logo, icons, message (Illustrator/PDF/JPEG)
- Newsletters and Email Blasts (Digital/PDF)
- Social Media Updates (Digital)
- Online Surveys (Digital)
- Project Webpage (HTML/CSS)
- Stakeholder Interview questions and summary (Word/PDF)
- Base Mapping (Illustrator/GIS/PDF)
- Administrative Draft Technical Studies: Land Use and Community Form; **Fiscal Conditions and Implications of Land Use Decisions**. Biological Resources; Cultural Resources; Traffic and Mobility; Noise; Infrastructure; Parks and Recreation; and Environmental Justice & Equity (Word/PDF)
- Final Draft Technical Studies (Word/PDF)
- Existing Conditions and Policy Implications Atlas (PowerPoint/PDF/10 hard copies)
- STAC Meeting #1 agenda, presentation and summary (Word/PowerPoint/PDF)
- Targeted Stakeholder Outreach #1 summary (Word/PDF)
- Draft General Plan Vision and Guiding Principles (InDesign/PDF)
- Community Workshop #1 notice, agenda, presentation and summary (Word/PowerPoint/PDF)
- Planning Commission Study Session presentation and summary (PowerPoint/Word/PDF)
- City Council Study Session presentations and summaries (PowerPoint/Word/PDF)

## PHASE 3

### EXPLORING ALTERNATIVES

#### **Task 3.1: Team Planning Charrette #1**

Building on the atlas and community engagement feedback, MIG will host a team charrette (Staff Technical Advisory Committee and consultant team members will participate) to develop a series of initial General Plan alternatives. These will include areas of stability and change mapping, potential land uses, mobility enhancements, sustainability principles, and community safety strategies. The charrette will be a three-hour “hands-on” session. MIG will prepare an agenda, visual aids, and materials for the charrette. MIG will record and photo document all discussion points.

#### **Task 3.2: Urban Footprint Land Use Alternatives**

We propose to analyze land use scenarios for the identified focus areas using UrbanFootprint. UrbanFootprint software includes analytical engines that measure the fiscal, environmental, transportation, public health, and community impacts of future scenarios, and that output specialized indicators regarding existing conditions and future scenarios. MIG will develop three scenarios for up to eight focus areas. Existing conditions and current land use policy will also be included. The UrbanFootprint data will be used for discussion with the STAC regarding the outcomes associated with each scenario in each focus area. This will allow the STAC to compare the alternatives and identify those that best implement the Community Vision and adhere to the General Plan Guiding Principles.

In addition to highly graphic land use alternative maps, UrbanFootprint can produce comparative graphics for the various scenarios to illustrate, for example, relative water consumption, vehicle miles traveled, energy use, or other indicators of interest.

#### **Task 3.3: Concept Alternatives Summary**

Building upon earlier tasks, MIG will prepare a Concept Alternatives Summary that summarizes the key features and major analysis take-aways for the alternatives. The summary will be highly graphical and include descriptive text, diagrams, and images (including photo simulations and sketches).

Each alternative will be formatted to be large display boards (42" x 60") that can be used during the public outreach and engagement process. It is anticipated that this summary will be 30 to 40 pages and developed using PowerPoint so it can easily be printed, shown/downloaded online, and shown during community engagement events. MIG will submit an Administrative Draft for City staff review. MIG will then prepare an updated and final version that reflects one round of City comments.

The Concept Alternatives Summary will include the following information and analysis:

#### *Fiscal Impact Analysis of Alternatives*

To help decision-makers and the community understand the tradeoffs of the three alternatives, EPS will provide a quantitative comparison of net annual fiscal impacts on the Atascadero General Fund for each of the General Plan Alternatives. EPS will rely on Phase 2 findings, City budget documents, interviews with major City departments (e.g., Police, Public Works), and industry-standard assumptions and budget-estimating techniques. EPS will develop a static fiscal impact model to compare General Fund revenues and costs for each Land Use Alternative.

#### *Impacts on Public Service Expenditures*

Building on the data developed in Phase 2, EPS typically relies on per-capita estimates and case study research to establish public service costs. Per-capita estimates most commonly are relied on to forecast costs for departments that provide general government services, planning services, and communitywide services. Case study-based analyses are applied to other city services such as police and public works. As part of the case study analyses, EPS may incorporate calls-for-service data from the police department and cost-per-road-mile data for road maintenance. The appropriate methodologies in each case will depend on available City data and discussions with individual City service providers.

#### *Impacts on General Fund Revenues*

Building on the data developed in Phase 2, EPS typically employs both per-capita and case study-based methods for estimating General Fund

revenues. Sales tax, property tax, and transient occupancy tax (TOT) revenues are typically the most significant sources of General Fund revenue. The analysis will devote effort to evaluating major City revenue sources influenced by land use. Property tax revenues will reflect anticipated real estate development deliveries, property value assumptions, and the City's property tax allocation factors. EPS will rely on market data obtained during Phase 1 to inform assumptions, as appropriate. Other revenue estimates, such as charges for service, franchise fees, and licenses and permits will be based on the City's current revenue performance in these areas.

#### *Net Fiscal Impact on General Fund*

Based on the data obtained and analysis conducted under the prior subtasks, EPS will compare General Fund revenues and expenditures and calculate the net fiscal impact of each Land Use Alternative. Results will assume General Plan buildout and will be presented in constant dollars, along with appropriate discussion of each land use option and caveats to the analytical findings.

#### *Safety, Resiliency and Sustainability Impacts*

Based on data and analysis conducted through Urban Footprint, MIG will prepare a summary on the potential safety, resiliency, and sustainability impacts or benefits of each alternative. This analysis will focus on natural systems (access to water, natural disasters) and potential natural and human-made disasters (wildfires, floods, earthquakes). This analysis will consider both quantitative and qualitative information to provide a comparison of each alternative.

### **Task 3.4: Community Engagement Series #2 - Exploring the Possibilities**

The second round of meetings with the STAC, community groups, and residents will occur after completion of the Concept Alternatives Summary. The purpose of the meetings is to solicit input from the community on the draft alternatives in engaging, interactive formats. MIG will develop a process and unique exercises to better understand community preferences regarding the alternatives.

The meetings will provide input that will help focus the range of possibilities and identify a draft Preferred General Plan Alternative. MIG will prepare all meeting agendas, presentations, materials, and exercises. This round of community meetings will include the following:

- **Staff Technical Advisory Committee (STAC) Meeting #2.** MIG will meet with the STAC to present and obtain feedback on the Concept Alternatives Summary. This will include a facilitated discussion to review and confirm all draft visualizations, the 3D model, and the Concept Alternatives. There will also be a discussion regarding the findings and considerations from the Multi-Modal Transportation Study. MIG will record these comments and ideas on a large wallgraphic.
- **Targeted Stakeholder Outreach #2.** MIG will conduct focused outreach to community groups to engage them on the Concept Alternatives and visualizations. This will include direct calls and discussions with stakeholders to fully understand their desires and concerns. This will provide an opportunity to informally discuss the feasibility of the development prototypes with regional developers and others. The budget for this task assumes MIG reaching out to 20 groups.
- **Community Workshop #2.** MIG will prepare materials for and facilitate a community workshop that builds upon all input received to date (either in-person or virtual). The MIG Team will conduct special outreach to a long list of residents and stakeholders to garner strong community interest. The agenda for the workshop would be to review and discuss the Concept Alternatives in several different formats. One format will be an interactive mapping exercise to refine transportation improvements, open space concepts and other elements. The second format will be an interactive, facilitated review of the full

concepts and visualizations. We will pause at key points in the fly-through and discuss alternatives in detail. We will simultaneously poll participants on planning, design, and mobility elements they like or dislike, and ask them why. MIG will provide three staff for this workshop to facilitate, record comments, and assist with break out groups and logistics. MIG staff will record comments on a large wallgraphic as a key tool to assist with meeting facilitation.

### **Task 3.5: Planning Commission Study Session**

MIG will meet with the Planning Commission in study sessions to present and receive feedback on the Concept Alternatives Summary. This important session will: (1) help to ensure that there is alignment on the emerging direction of the General Plan Update and (2) allow the Planning Commission to provide feedback that will go directly into the plan development. It is anticipated that this study session will result in the selection of a preferred vision and alternative that will be the basis for drafting the updated General Plan. MIG will provide two staff and a PowerPoint presentation for this session. Alternatively, this study session can be held as a joint working session with the Planning Commission and City Council.

### **Task 3.6: City Council Study Sessions (2)**

MIG will meet with the City Council two times during this phase. The first meeting will be to discuss the goals and process and to provide preliminary input for this phase. The second meeting will be to present and review feedback on the Concept Alternatives Summary, and provide refined feedback and direction. These important sessions will: (1) help to ensure that there is alignment on the emerging direction of the General Plan Update and (2) allow the City Council to provide direction on a preferred Vision, Guiding Principles, and Alternative that will become the basis for the Draft 2045 General Plan. MIG will provide two staff and a PowerPoint presentation for each session.

### **Task 3.7: Emerging Preferred General Plan Alternative**

Based on input received during the community meetings and the direction received from the Planning Commission and the City Council, the MIG Team will develop a Preferred Alternative that will serve as a basis for the draft General Plan. The Preferred Alternative will include a refined Vision supported by a series of transformative strategies—key

public projects and catalytic site developments that will spur the first wave of investment necessary to gain momentum for increased housing and employment opportunities in Downtown. The Preferred Alternative will be presented as a series of highly visual poster with concise text, visualizations, mapping, and other graphics.

**Phase 3 Deliverables:**

- Team Charrette materials and summary (Word/GIS/PDF)
- Draft Focus Areas of Change (Illustrator/PDF)
- Three Land Use Scenarios for each Focus Area, with UrbanFootprint outputs (UF/GIS/PDF)
- Administrative Draft Concept Alternatives Summary (InDesign/PDF/10 hard copies)
- STAC Meeting #2 agenda, presentation and summary (Word/PowerPoint/PDF)
- Targeted Stakeholder Outreach #2 summary (Word/PDF)
- Draft General Plan Vision and Guiding Principles (InDesign/PDF)
- Community Workshop #2 notice, agenda, presentation and summary (Word/PowerPoint/PDF)
- Planning Commission Study Session presentation and summary (PowerPoint/Word/PDF)
- City Council Study Session presentations and summaries (PowerPoint/Word/PDF)
- Final Concept Alternatives Summary (InDesign/PDF/10 hard copies)
- Final Community Vision and Guiding Principles (InDesign/PDF)
- Emerging Preferred General Plan Alternative (Illustrator/Word/PDF)

## PHASE 4

### A PLAN FOR ATASCADERO 2045

#### Task 4.1: General Plan Framework

Prior to crafting the new General Plan, MIG will work with City staff to confirm its structure, including layout and organization of chapters. The overall goal is to create a streamlined General Plan that works well both in printed form and as a website ePlan using MIG’s Tangerine software. We will prepare an overarching General Plan Framework document that will be a detailed table of contents with associated figures and graphics. The budget assumes one round of City staff review and comments on the Framework.

#### Task 4.2: Administrative Draft 2045 General Plan

The MIG Team will prepare a new, comprehensive General Plan based on the technical analysis, input received during earlier phases, and State legal requirements. The Administrative Draft General Plan will reflect expressed community values, such as economic vitality, sustainability, safe and healthy communities, connectivity, fiscal sustainability and education throughout each element. As noted above, we will incorporate sustainability and healthy community concepts into each of the individual elements. The updated General Plan will also include a comprehensive implementation program that will focus on having the Plan be a living document that results in the desired change in the community.

The updated General Plan will likely include the following chapters or “elements.” The exact title, order, and arrangement of elements and topics will be discussed and confirmed with City staff based on direction from the Phase I scoping meeting.

- **Introduction.** MIG will prepare an Introduction that summarizes the new General Plan. This will include a summary of the update process, extensive public outreach and engagement process, and a specific discussion on how the updated Plan addresses recent and emerging state sustainability and greenhouse gas reduction mandates.
- **Land Use and Community Form Element.** MIG will prepare a Land Use and Community Form Element that includes a new Land Use Diagram and updated land use designations that

include allowable use, density ranges, floor-area ratios and other appropriate standards. We will describe the general land use patterns envisioned for Atascadero and map the distribution of open space and density. This will include developing a set of standard street design guidelines based on the variety of street typologies specified in the plan. Building from the vision and community values, MIG will identify new goals, policies and implementation measures that will form the basis of urban design components to the General Plan.

We will utilize the extensive public outreach and engagement process results as a resource that provides initial direction for defining urban design standards and guidelines. MIG will use photo examples to illustrate development standards, prototypes, and character in focus areas. We will create a map and describe the distribution of character areas, building heights, development intensity, and key public/private interface areas. MIG will also develop policies to promote community goals such as public health and equality, promote infill and compact development, revitalize urban and community centers, and protect natural resources.

- **Circulation Element.** MIG, with support from CCTC, will prepare a Circulation Element that describes the planned transportation network, including a new Circulation Diagram. We will produce full-color maps showing planned pedestrian facilities; bicycle facilities; bus, shuttle and paratransit facilities and services; electric vehicle infrastructure; and streets and roadways for automobiles, including freight and high-occupancy-vehicles. We will update general plan policies related to Complete Streets and multimodal transportation, Transportation Demand Management, access for the mobility impaired, site design guidelines, guidelines for the coordination of land use and development with the provision of adequate transportation facilities and services, and neighborhood traffic management. We will also develop an Access Action Plan, including a work plan and timeline for near-term and long-range actions necessary to implement the plans and policies in the Mobility Element.
- **Conservation and Open Space Element.** MIG will prepare a Conservation and Open Space Element that shows the distribution and potential locations of recreation facilities,

schools, public buildings, and historic buildings and landscapes. We will produce maps and define requirements for trails, parks, and recreation access, as well as cultural and historical resources. We will also identify methods for conservation of features such as water, soils, archeological resources, and wildlife.

- **Noise Element.** MIG will prepare a Noise Element that includes appropriate noise standards and policies to address development under the new General Plan. Distances to predicted future average-daily noise contours will be quantified for up to 30 major roadway segments and summarized in tabular format. Predicted average-daily noise contours for up to five major transportation corridors will be depicted graphically.
- **Safety Element.** MIG will prepare an updated Safety Element that addresses areas constrained by hazards such as high noise levels, flooding, seismic and geologic hazards, fire danger, hazardous materials, climate change impacts and resiliency, and other topics as appropriate. This will include policies and programs specifically related to greenhouse gas reduction, climate change adaptation, and sustainability.
- **Economic Development Element.** MIG, with support from EPS, will prepare an optional Economic Development Element that supports the General Plan's vision from an economic perspective. This may be a stand-alone element or be addressed as part of other elements. The element will include a realistic plan to implement its economic goals and objectives in the absence of redevelopment. In preparing this element, the team will evaluate current and future development opportunities, and help the City identify related goals in terms of job quality, reduced unemployment, tax benefits, retail shopping opportunities and visitor-serving uses. Based on the assessment of goals and opportunities, MIG will craft a policy framework, internally consistent with other general plan elements, to clearly express the City's economic development vision. The element will include an implementation action plan that recognizes the City's anticipated staffing capabilities, and which leverages local and regional resources to maximize Atascadero's profile in the marketplace.
- **Environmental Justice Element.** We recognize that community wellness and environmental justice are complementary topic

areas with similar goals, providing a safe and clean physical environment and distributing public services equitably to all segments of Atascadero’s population. MIG will prepare the community wellness component to focus on access to parks and recreation, healthy food options, increasing transportation options to all residents, allowing safe and affordable housing options, and crime prevention and overall public safety. The environmental justice component will focus on policies to reduce pollution exposure and environmental burdens affecting low-income and minority populations, improve air quality, and minimize impacts on sensitive population groups. It will also look at collaborative policies (e.g., coordination and funding agreements with other public agencies) to encourage greater access to education and job skills training at all age levels.

- **Public Services and Infrastructure Element.** MIG, with support from BKF, will develop an optional Public Services and Infrastructure Element or address this area through the other elements. This element will include goals, policies and programs related to fire, police, emergency medical services, disaster preparedness, water, wastewater, telecommunications, and drainage. There will be a special focus on the creation of Low Impact Development (LID) techniques and sustainability concepts in new infrastructure investment. Additional policies will be developed by MIG to address parks, recreation and other City services and facilities beyond just infrastructure.
- **Implementation Plan.** MIG will prepare a detailed implementation plan as part of the General Plan. This chapter will include a series of matrices that identify programs, responsibilities, time frames, and funding sources for all major General Plan implementation activities. EPS will provide an assessment of the financing tools and policies that may be available to the City. While various innovative funding sources and financing techniques may be available, four primary funding sources will nearly always form the backbone of any financing program: 1) Development-Based Funding; 2) Land-Secured Funding and Financing; 3) City Funding and Financing; and 4) State and Federal Programs. While EPS will make recommendations concerning the alignment of sources and uses, quantifying infrastructure costs and revenue that may be generated by each funding and financing source is beyond the scope of the proposed Financing and Implementation Plan task.

The Administrative Draft General Plan will be submitted to the City as a series of separate Word files with embedded or attached images and figures. The budget assumes one round of review by City staff and a consolidated and reconciled set of comments.

### **Task 4.3: Community Draft 2045 General Plan**

MIG will incorporate City staff comments and prepare a public draft General Plan. The public draft General Plan will include formatting that is highly graphic and easy to read. This draft will be formatted in either a Word or InDesign template that can be used as part of MIG's Tangerine software (e.g., the Word/InDesign file will be linked to the ePlan website so future changes to the document will automatically update the ePlan website). This version of the plan will include all images, figures, and diagrams necessary to fully articulate the policy concepts included under each element.

### **Task 4.5: Community Engagement Series #3 - General Plan Open House**

The third round of meetings with the Staff Technical Advisory Committee, community groups, and residents will occur after completion of the Community Draft 2045 General Plan. The purpose of the meetings is to solicit input from the community on the draft Plan document in engaging, interactive formats. MIG will develop a process and unique exercises to better understand community preferences regarding the alternatives.

The meetings will provide input that will help focus the range of possibilities and identify a draft Preferred General Plan Alternative. MIG will prepare all meeting agendas, presentations, materials, and exercises. This round of community meetings will include the following:

- **Staff Technical Advisory Committee Meeting #3.** MIG will meet with the STAC to present and obtain feedback on the Administrative Draft 2045 General Plan. This will include a facilitated discussion to review and confirm all draft elements and policy content.
- **Community Open House.** MIG will plan and facilitate a citywide open house on the draft General Plan (either in-person or virtual). The MIG Team will be available to answer questions about the project and the draft General Plan elements. This will provide an opportunity for members of the public to provide feedback on

the draft elements, including the vision, goals, policies, and programs. MIG will prepare large boards or posters that describe each of the draft elements, highlighting new policy concepts and major changes from the existing General Plan. MIG, in coordination with City staff and the project team, will be responsible for developing the content, printing materials, and facilitating each workshop. MIG will provide three to four staff for this workshop to facilitate, record comments, and assist with break out groups and logistics.

#### **Task 4.6: Planning Commission Study Session**

MIG will meet with the Planning Commission to present, discuss, and receive feedback on the Community Draft 2045 General Plan. This study session will provide an opportunity for the Planning Commission to formally receive public comments on the draft General Plan, as questions to the consultant team and City staff, and discuss draft policies, programs, and actions. MIG will prepare a presentation and concise summary of the discussion during this study session. Alternatively, this study session can be held as a joint working session with the Planning Commission and City Council.

#### **Task 4.7: City Council Study Sessions (2)**

MIG will meet with the City Council two times during this phase. The first meeting will be to discuss the goals and process for this phase and to provide preliminary input. The second meeting will be to present, discuss, and receive feedback on the Community Draft 2045 General Plan. These study sessions will provide an opportunity for the City Council to formally receive public comments on the draft General Plan, as questions to the consultant team and City staff, and provide direction on draft policies, programs, and actions. MIG will prepare a presentation and concise summary of the discussion during each study session.

#### **Task 4.8: Draft 2045 General Plan**

MIG will update the General Plan based on direction from the City Council. This will include any necessary changes to the policies, programs, or action prior to the completion of the Draft Program EIR.

#### **Task 4.9: CEQA Initiation (IS, NOP, Scoping Meeting)**

SWCA will complete an Initial Study (IS) checklist and narrative to appropriately focus the topical contents of the General Plan Environmental Impact Report (EIR). Those focus topics determined to have a potentially significant impact on the environment will be further analyzed during development of the Draft EIR, and associated mitigation strategies closely linked to General Plan policies will be identified. MIG will also prepare the EIR Notice of Preparation (NOP) to attach to the IS and will attend one CEQA-required EIR scoping session with responsible/interested agencies and members of the public.

#### **Task 4.10: Draft Program EIR**

The MIG Team will develop a program-level Draft EIR that considers all aspects of General Plan implementation (i.e., citywide policy initiatives, as well as potential individual project approvals, construction, and operation) in order to streamline both future entitlements and CEQA work. This task will be concurrent and collaborative with the General Plan update process. Environmental topic areas and potential CEQA-defined impacts will be aligned with potential new policies and amendments. General Plan policies will address environmental topics such as sustainability, efficient land use, and connectivity, which in turn will avoid or reduce potential impacts. The EIR will not react to a completed General Plan Update; the EIR will help form the update process.

Mitigation will be developed through close coordination with General Plan policies and implementation strategies, integration of uniformly applicable development standards (CEQA section 15183 - Projects Consistent with a Community Plan or Zoning), and application of mitigation measures from recent projects. In turn, the evaluation of focus topics in the Draft EIR will identify how proactive measures will avoid or reduce potential impacts to less-than-significant levels, without the need for additional mitigation.

CEQA encourages the efficient use of applicable, certified CEQA documents and discourages redundancy. The EIR will enable streamlined CEQA review for future individual development proposals, based on the following CEQA Guidelines sections:

- 15183 – Projects Consistent with a Community Plan or Zoning
- 15183.3 – Streamlining for Infill Projects

- 15152 – Tiering
- 15162 – Subsequent EIRs and Negative Declarations
- 15163 – Supplement to an EIR
- 15168 – Program EIR

Each of the CEQA Guidelines sections listed above affords opportunities for significant streamlining. In addition, the Governor’s Office of Planning and Research (OPR) has identified additional CEQA streamlining and exemption provisions relevant to the General Plan Update, in the following Technical Advisories: CEQA Review of Housing Projects (January 2020) and CEQA Exemptions Outside of the CEQA Statute (June 2018).

SWCA will prepare guidelines explaining how the City can apply these CEQA streamlining opportunities to future projects. The guidelines will be included in the Draft EIR introduction – so that decision makers and other readers can easily understand how the City will use the EIR proactively over time as the Update is implemented. The guidelines can also be printed separately as a handout for individual project applicants to help the applicant better understand the CEQA process and how the City’s process can save time and money.

We anticipate that the following 14 focus topics will be of importance to City decision makers, interested agencies and the public during their consideration of the General Plan. These topics will receive emphasis in the Draft EIR. For the remaining topics (agriculture and forestry resources, mineral resources), the Initial Study will include brief written statements explaining why no significant impacts are anticipated. Likewise, the Initial Study will be the foundation for focusing potential impacts so that the EIR does not include irrelevant information that obscures environmental issues that need to be addressed.

- Aesthetics. Consistent with CEQA, the EIR will independently evaluate the potential impacts of the land use and urban design policies on the visual character and image of the planning area. This will include potential citywide impacts under the General Plan buildout. Beneficial aesthetic effects of the Update also will be discussed. The EIR will recommend any project refinements warranted to minimize identified visual impacts, including measures that ultimately may be incorporated into the Zoning Ordinance and/or Specific Plans.

- Air Quality. The EIR will assess the local and regional air quality impacts associated with General Plan buildout. The analysis will be based on the most recently adopted SLO County APCD (APCD)-recommended guidance. Emissions of criteria air pollutants will be quantified based on projected changes in land use and vehicle-miles traveled associated with the proposed General Plan buildout. For any significant impacts, the EIR will identify mitigation measures consistent with APCD CEQA requirements that can be formulated into General Plan policies or zoning amendments.
- Biological Resources. Based on available biological surveys of special-status plants and animals in the City, SWCA will ensure that General Plan Update policies and amendments regarding these resources are consistent with Best Management Practices and jurisdictional protocols for mitigating potential impacts.
- Cultural and Historic Resources. Pursuant to CEQA Guidelines section 15064.5, the EIR will evaluate the potential effects of the General Plan Update on any identified or potential cultural or historic resources in the planning area. CEQA-based mitigation protocols that can be incorporated directly into General Plan policy will be identified.
- Energy Use/Conservation. The EIR will assess energy use impacts associated with General Plan buildout. Energy use associated with buildout of the proposed General Plan, including use of electricity, natural gas, and fuels will be quantified, to the extent possible. For any significant impacts, the EIR will identify mitigation measures that can be formulated into General Plan policies or zoning amendments.
- Geology and Soils. The EIR will identify potential geotechnical impacts of General Plan development and describe mitigation protocols (including City Building Department requirements) to reduce potential impacts of earthquakes to less-than-significant levels.
- Greenhouse Gas Emissions (GHG). The EIR will address the GHG implications, both beneficial and adverse, of General Plan buildout. The analysis will be based on the most recently adopted APCD-recommended guidance. Emissions of GHGs will be quantified based on projected changes in land use and

vehicle-miles traveled associated with the proposed General Plan buildout. GHG thresholds will be quantified based on locally appropriate emission sectors identified in the State's 2017 Scoping Plan corresponding with the State's 2030 and 2050 GHG-reduction targets. Consistency with the State's GHG-reduction targets and applicable plans will be discussed. For any significant impacts, the EIR will identify mitigations consistent with APCD CEQA requirements that can be included in General Plan Update policies.

- Hazards and Hazardous Materials. Based on review of available data (including the Department of Toxic Substances Control EnviroStor website), the EIR will discuss the potential for future hazardous material exposure impacts associated with potential development under General Plan buildout and describe associated jurisdictional mitigation protocols. SWCA describe the Federal, State, County and local regulations that apply to the use, storage, transport and disposal of hazardous materials in the planning area in the "Regulatory Setting" section of this EIR chapter. Based on these regulations, the EIR will describe the any proposed changes to the City's review process regarding hazardous materials and evaluate how those changes would avoid or reduce potential environmental impacts.
- Hydrology and Water Quality. The EIR will describe drainage, flooding and water quality issues. BKF will assist in analyzing potential impacts and identifying mitigations. This analysis will be a detailed overview and will not include modeling or analyses of individual segments of pipeline, or the sizing of any potential water quality features or improvements.
- Land Use and Planning. The EIR will independently evaluate the land use implications, both beneficial and adverse, of the General Plan Update and will identify any significant impacts under CEQA (e.g., "division of an established neighborhood"). The EIR will then identify any associated mitigations, including recommended General Plan refinements that can be incorporated directly into Update policies. In addition, to comply with CEQA, the consistency of the General Plan proposed policies with relevant regional planning policies (e.g., SLOAPCD) will be evaluated.

- Noise and Vibration. The EIR will describe the impacts of General Plan development policies and associated future buildout on the local noise/vibration environment. Short- and long-term noise measurements and existing noise contours will be included based on information to be derived from the existing conditions report to be prepared as part of the proposed General Plan update. The EIR will include an analysis of non-transportation and transportation noise sources. Short-term noise and vibration impacts associated with construction activities and land use compatibility within projected noise environments will be discussed. Distance to predicted future average-daily noise contours will be quantified for up to 30 major roadway segments. Projected future noise contours for up to 5 major transportation corridors will be depicted graphically in the report. The EIR will then identify effective and feasible mitigations that can be incorporated directly into General Plan Update.
- Population and Housing. The EIR will describe the General Plan Update's potential effects on housing and population to provide the statistical basis for related quantitative environmental impact evaluations (e.g., public services and utilities). General Plan Update implementation is not, in itself, expected to cause CEQA-defined population or housing impacts (e.g., substantial displacement).
- Public Services (including recreation). The EIR will evaluate the General Plan Update's effects on the following public services: fire protection, police protection, schools and parks/recreation. Appropriate service providers (identified in coordination with City staff) will be contacted to help identify potential impacts and formulate any mitigations that can be incorporated into General Plan Update policy and uniform standards.
- Transportation and Traffic. CCTC will prepare the travel demand forecasts using the SLOCOG model. The Year 2045 modeling process consists of the following subtasks:
  - To evaluate the General Plan policies, transportation projects and the land use program, CCTC will use the SLOCOG model to develop General Plan horizon year traffic volume forecasts for roadway segments and intersections where the data collection activities were focused. VMT estimates for the City will also be produced

based on the SLOCOG model. CCTC will prepare traffic volume forecasts and VMT information for up to three initial alternatives and one preferred alternative (for inclusion into the EIR). The analysis of the preferred alternative will also include LOS analysis of roadway segments and intersections

- CCTC will review both the land use inputs contained in the Travel Analysis Zones (TAZs) that represent the City in the SLOCOG model for both the base year and forecast year. CCTC will extract the land use information from the SLOCOG model for the City TAZs. The base year inputs will be reviewed by CCTC and City staff to confirm that they accurately reflect current development conditions. For the future year inputs, the City and other members of the Consultant Team will be relied upon to specify what changes are needed to reflect the effects of the proposed initial alternatives and preferred alternative.
- CCTC shall also review the transportation networks reflected in the SLOCOG model to check that it accurately reflects the current conditions in the base year and the anticipated future transportation improvements in the future year. CCTC will provide City staff with plots from the SLOCOG model of roadways in the City area; the plots would display the number of lanes, posted speeds, facility type, etc. assumed in the base year model and the future year model. As part of this task, CCTC will make adjustments to the SLOCOG model roadway networks based on feedback from City staff as well as adopted City and nearby San Luis Obispo County General Plan roadway network.
- While a comparison of count volumes to model volumes will be completed for seeding of the traffic volume forecasting process, it is assumed that a static model revalidation effort for the SLOCOG model (versus traffic count data) will not be required as the SLOCOG model has been calibrated and validated as a part of regional planning efforts. If, after consultation with City staff, a model revalidation effort is required, CCTC will prepare a scope and budget amendment.

- CCTC will use the future year SLOCOG model to evaluate the initial three alternatives and preferred proposed land use plans, generate traffic volume forecasts at the study locations, and prepare estimates of total VMT by speed bin, home-based VMT per resident, and home-based work trip VMT per employee for the City area. The final model results will contain the final land use and circulation system improvements, and the transportation network identified to support the final Preferred Alternative will be represented in the Circulation Diagram in the General Plan Based on the home-based and employment-based VMT information, CCTC will develop revised VMT-based CEQA transportation impact criteria.
- The future year traffic volume estimates for roadway segments and intersections will be reviewed as part of the alternatives analysis process. For the preferred alternative, the traffic volume forecasts be input into the traffic operations models developed as part of Task B. CCTC will output LOS from these models and compare to the City's proposed LOS policy. If deficiencies are projected to occur, improvements will be suggested to alleviate the deficiency. It is noted that LOS will not be included in the Environmental Impact Report for the General Plan update as the EIR would be governed by the provisions of the new CEQA Guidelines that implement Senate Bill 743.
- CCTC will evaluate the Preferred Alternative's effect on VMT generated by the future land use program using the data from Task D. CCTC will rely on input from the City and the Consultant Team as to the most appropriate significance criteria to be used to determine CEQA transportation impact significance. If a significant CEQA transportation impact is identified, mitigation measures will be developed to reduce the level of impact. The effectiveness of the mitigation measures will be quantified based on the latest available effectiveness research. The mitigation measures may include feedback to General Plan policies that could be modified to reduce impacts to a less than significant level, to accomplish the goal of having the General Plan be self-mitigating to the extent feasible.

- CCTC will also evaluate the transit and non-motorized effects of the No Project and the Preferred Alternative scenarios. Mitigation measures to address potentially significant impacts will be recommended, which may include feedback to General Plan policies that could be modified to reduce impacts to a less than significant level.
- The results will be documented in a Transportation Impact Assessment report, which will be submitted to the City and Consultant Team for review and one round of comments. It is expected that others on the project team will use this and other technical reports to prepare the Transportation and Circulation section of the Administrative Draft and Draft EIR. CCTC will review the draft environmental documents for consistency with our analysis. CCTC will assist the Consultant Team in preparing responses to public comments on the Draft EIR; this scope of work assumes 16 hours of staff time to respond to comments on the Draft EIR.
- It should be noted that emerging transportation technologies will need to be addressed at a policy level in the General Plan, and the potential effects of these technologies on roadway needs, transit ridership, VMT, parking, and curbside management will be discussed qualitatively in the Transportation Impact Assessment report. In light of the high level of uncertainty associated with the emergence of these technologies, they will not be represented quantitatively in the transportation impact assessment.
  - Utilities and Service Systems. The EIR will evaluate the project's effects on water supply and distribution, sanitary sewer treatment capacity and distribution, and storm drainage. The EIR will also evaluate solid waste/recycling services.

An Administrative Draft EIR will be delivered for City staff review, and then a Screencheck Draft EIR will be prepared for final review by a limited number of City staff before a public release Draft EIR is completed.

## Phase 4 Deliverables

- Draft General Plan Framework (InDesign/PDF)
- Final General Plan Framework (InDesign/PDF)
- Administrative Draft 2045 General Plan (Word/Illustrator/GIS/PDF/5 printed copies)
- Community Draft 2045 General Plan (Word or InDesign/Illustrator/PDF)
- STAC Meeting #4 agenda, presentation, and summary (Word/PowerPoint/PDF)
- Draft General Plan Vision and Guiding Principles (InDesign/PDF)
- Community Workshop #2 notice, agenda, presentation, and summary (Word/PowerPoint/PDF)
- Planning Commission Study Session presentation and summary (PowerPoint/Word/PDF)
- City Council Study Session presentations and summaries (PowerPoint/Word/PDF)
- Draft 2045 General Plan (Word or InDesign/PDF/10 hard copies)
- CEQA Initial Study and Notice of Preparation (Word/PDF)
- Administrative Draft Program EIR (Word/PDF)
- Screencheck Draft Program EIR (Word/PDF)
- Public Release Draft Program EIR (Word/PDF)

## PHASE 5 CELEBRATE OUR FUTURE

### Task 5.1: Final EIR

The MIG Team will prepare a Final EIR that includes responses to public and agency comments received on the Draft EIR during the 45-day public review period. The budget assumes there approximately 80 hours of staff time to response to comments. MIG will also prepare a Mitigation Monitoring and Reporting Program for adoption with the Update. An Administrative Final EIR will be delivered for City staff review before a public release Final EIR is completed.

### Task 5.2: Planning Commission Public Hearings (2)

The MIG Team will attend two Planning Commission public hearings to present, discuss, and receive comments on the Draft General Plan and

Final EIR. The first hearing will provide an opportunity for the Planning Commission to receive formal public comments, ask questions to the MIG Team, and begin deliberations. The second hearing will provide an opportunity to continue the discussion and deliberations, with the Planning Commission making a formal recommendation on the Draft General Plan and EIR. MIG will be responsible for preparing presentation; City staff will be responsible for preparing the formal staff report.

### **Task 5.3: City Council Public Hearings (2)**

The MIG Team will attend two City Council public hearings to present, discuss, and receive comments on the Draft General Plan and Final EIR. The first hearing will provide an opportunity for the City Council to receive formal public comments, ask questions to the MIG Team, and begin deliberations. The second hearing will provide an opportunity to continue the discussion and deliberations, with the City Council taking formal action to adopt the new General Plan and certify the EIR. MIG will be responsible for preparing presentation; City staff will be responsible for preparing the formal staff report.

### **Task 5.4: Final 2045 General Plan ePlan (online version)**

MIG will set up and customize Tangerine™ software for single-click website creation using the InDesign or MS Word template created for the print copy 2045 General Plan. Using the Tangerine™ software, we will convert the final 2045 General Plan into a searchable and interactive ePlan that works well on both desktop computers and mobile phones. This will include an extensive database to create an implementation page that links policies and programs with responsible City departments, time frames, and funding resources. The online General Plan document will have the ability to be printed and archived with date tracking and version control, to support both City operations and also to address California Municipal Code requirements.

This task includes the graphic and visual creation of the ePlan website (e.g., color palette, photo and graphic imagery, and icons). We will start with an Alpha release of the website upon 25 percent completion of the content loading and a Beta release upon 50 percent completion of the content loading. MIG will meet with City staff during both the Alpha and Beta releases to review the content and functionality of the ePlan site. This task also includes development of any auxiliary website pages such as the home page or other landing pages not part of the InDesign

or Word template. Once the General Plan ePlan is approved, MIG will make the web-based General Plan version publicly accessible and announce its launch through social media.

### **Phase 5 Deliverables**

- Final Program EIR (Word/PDF)
- Final 2045 General Plan – Online ePlan Version (Digital/Tangerine)
- Planning Commission Public Hearings presentations (PowerPoint/PDF)
- City Council Public Hearings presentations (PowerPoint/PDF)

## **PHASE 6**

### **ONGOING TEAM COORDINATION**

#### **Task 6.1: Client Coordination Calls and Meetings (24 months)**

Key MIG Staff will attend conference calls twice a month with City to coordinate on the project, discuss strategies and work products, and schedule near term items and data needs. MIG Project Manager Dan Amsden will attend each of these calls. Additional technical staff will be included in calls related to their tasks or work products as needed. As such, the budget assumes a reasonable level of involvement for all team members during the duration of the project. City staff will be responsible for reviewing draft agendas and participating in calls.

In addition to the coordination calls, Laura Stetson, Dan Amsden, and Noe Noyola will meet quarterly with City staff in Atascadero (or digitally) to discuss the project, refine the schedule and outreach plan, and strategize about upcoming events or milestone documents. The budget assumes eight of these meetings will occur during the duration of the project. City staff will be responsible for securing meeting space, reviewing draft agendas and participating in the meetings.

#### **Task 6.2: Ongoing Project Management (24 months)**

MIG will have the lead role managing the process to ensure the project remains on budget and schedule. This task accounts for MIG's project management and coordination with both City staff and the subconsultant team, as well as regular invoicing, schedule, and budget management.

#### **Task 6.3: Other Agency Meetings (10)**

MIG will coordinate with other public agencies throughout the General Plan Update process. This task includes up to 10 meetings with other agencies during the project, plus ongoing phone and email coordination. This task will allow MIG to have flexible and timely engagement with key groups that may have specific issues or require in-depth conversations with the project team. These meetings will help keep other community workshops focused and ensure the project remains on topic and schedule.

## **PROJECT BUDGET**

The attached Fee Proposal spreadsheet identifies anticipated project costs by phase, task, person, and firm. We included a breakdown of direct costs for each task or firm. In addition, we included budget figures for all optional tasks identified in the work program, including additional per meeting and workshop costs.

We are most interested in ensuring that the project scope and budget are aligned with the level of detail and expectations envisioned for this project by the City of Atascadero. As such, we are open to discussing all aspects of the Draft Work Plan and Fee Proposal with City staff and adjusting the scope and budget as necessary to meet the City's goals.







# PROJECT SCOPING MEETING NOTES

## ATASCADERO 2045 GENERAL PLAN UPDATE

JANUARY 28, 2022

# Atascadero: Looking Ahead

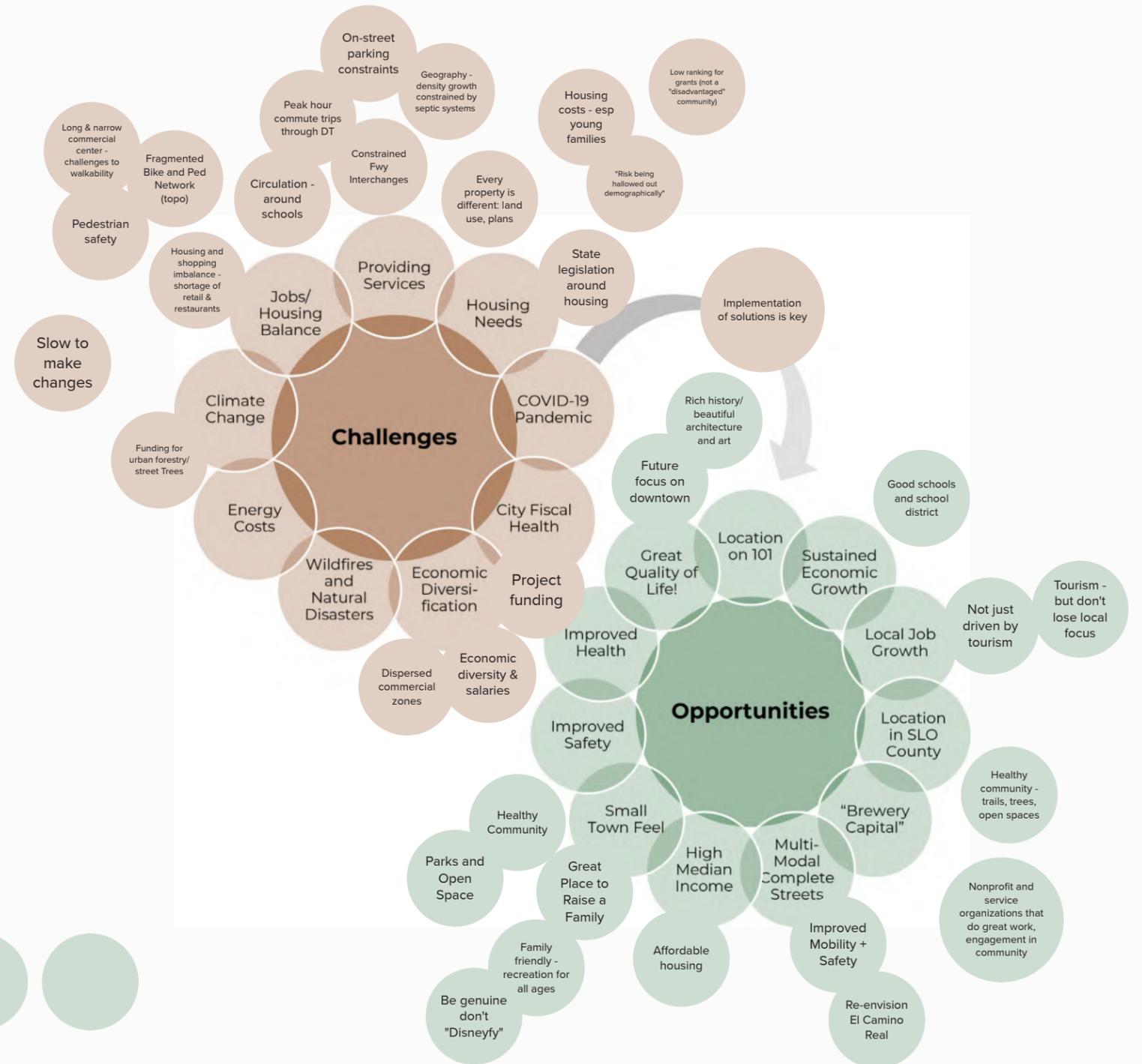
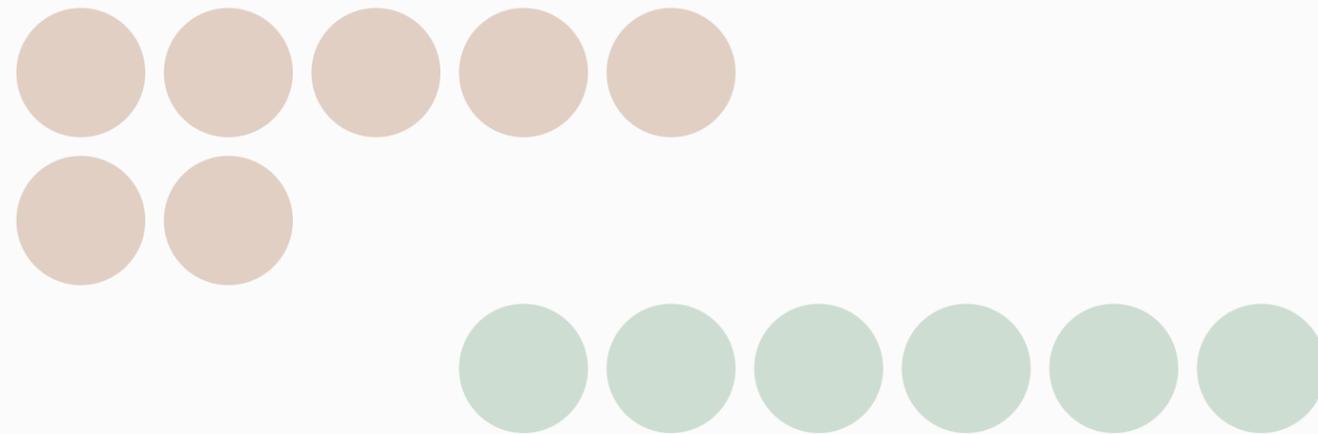
What are the greatest assets of Atascadero that make the community special and unique?

What are the most pressing issues Atascadero faces today that will shape decisions for the next 15-20 years and beyond?

## ASSETS



## CHALLENGES/OPPORTUNITIES





# Community Engagement

What guiding principles should shape the community engagement process?

What types of community engagement activities, platforms, and/or partnerships have worked well in the past that should be included or built upon for the General Plan Update?



- Several outreach opportunities
- No plan van - costly
- Partner with school district
- Youth design charrettes
- Inclusive engagement - playgrounds, youth soccer
- Engage Latino community
- Think about partnerships with existing youth organizations/schools & internship opportunities to get youth and young adult (college age) input
- Utilize community center
- Have Spanish Translation Available
- Connect to population without tech - print format
- QR code for survey and project website
- Education on local politics
- Multilingual engagement
- Engage with community orgs
- Religious groups
- Engage Local Service Orgs (Kiwanis, Rotary...)
- Advertise on Dial-A-Ride vehicle
- Dinnertime at Echo
- Rotary club
- Something that can go viral
- "I grew up in Atascadero" FB group
- Business owner outreach

## Roles and Responsibilities

How would the Council and Commission like to be involved in the General Plan Update?

### PLANNING COMMISSION

- How will the General Plan schedule impact other Planning Commission Meetings?
- Educational message/Toolkits
- Council/Commission Talking Points about the General Plan process
- Give us something to "go viral" with and share with our followers
- 

### CITY COUNCIL

- Council/Commission Talking Points about the General Plan process
- Council engagement with Service Groups
- 
-

## Process and Desired Outcomes

What level of economic and/or fiscal analysis would be helpful to inform community and Council policy discussions?

Combination at different levels	Level A	A & B combo	
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Would the City like to use the updated General Plan to help streamline future development projects that are consistent with new policy direction? ✓

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What is the desired final format for the General Plan: a printed copy and/or interactive website?

✓✓✓ Interactive website	Link to zoning and other info?
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Is there anything else we should discuss that will help inform the General Plan Update scope and process?

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# ***Atascadero City Council***

## ***Staff Report – City Manager’s Office***

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### **SB 1383 – Recovered Organic Waste Products Procurement Requirements**

#### **RECOMMENDATION:**

Council adopt a Draft Resolution amending the Purchasing Policy to add Section X, creating a new policy and procedures for the purchase of recovered organic waste products as required by Senate Bill 1383.

#### **DISCUSSION:**

At the February 22, 2022 Council Meeting, staff gave a presentation regarding Senate Bill 1383 (SB 1383) and the regulations and requirements adopted by Department of Resources Recycling & Recovery (CalRecycle) to achieve methane reduction targets in a statewide effort to reduce emissions of short-lived climate pollutants (SLCP). These regulations were finalized by CalRecycle in November 2020 and became effective on January 1, 2022, giving local jurisdictions just 14 months to comply with the requirements of the regulations.

As part of SB 1383 compliance, Council adopted Ordinance No. 653 updates to Title 6, Chapter 4 (Solid Waste Collection) of the Atascadero Municipal Code (AMC) to align with the legislative mandates of SB 1383. Additionally, the City Council adopted update Title 8 of the AMC to establish a water efficient landscape and irrigation ordinance and require compliance with specific sections of the California Green Building Code.

The City must now adopt a Recovered Organic Waste Product Procurement Policy. The SB 1383 regulations define two different types of procurement that the City is required to implement: the procurement of organic waste products and the purchase of recycled-content paper.

#### **Organic Waste Products**

Organic waste products are defined by the regulations as certain products that are made from organic waste that is diverted from the landfill. This can include compost, mulch, RNG, energy, and other products made from organic waste facilities. This definition does not include mulch made from trees that were trimmed or removed and chipped onsite.

CalRecycle’s SB 1383 regulations require the City to procure a prescribed quantity of recovered organic waste products to meet an annual procurement target based on population: 0.08 tons of organic waste per resident per year. CalRecycle will annually

provide the City with its procurement target, which is recalculated every 5 years. CalRecycle has notified the City that the annual procurement target through December 2026 is 2,369.8 tons of organic waste products. The table below displays the procurement target calculations, details each qualifying organic waste product type, and the amount of each type needed annually based on meeting the procurement target using only one type of recovered organic waste product.

<b>Atascadero Population</b> (based on 2020 census)				29,623
<b>Per Capita Procurement Target</b>				0.08
<b>Annual Recovered Organic Waste Product Procurement Target</b>				<b>2,369.8</b>
<b>Recovered Organic Waste Product</b>	<b>One Ton Equivalent</b>	<b>Quantity Procured Annually</b>	<b>Quantity Procured Monthly</b>	<b>Unit</b>
Renewable Gas in the form of Transportation Fuel	21	49,766.6	4,147.2	DGE
Electricity from Renewable Gas	242	573,501.3	47,791.8	kWh
Heat from Renewable Gas	22	52,136.5	4,344.7	therms
Electricity from Biomass Conversion	650	1,540,396.0	128,366.3	kWh
Compost (tons)	0.58	1,374.5	114.5	tons
Compost (cubic yards)	1.45	3,436.3	286.4	cubic yards
Mulch	1	2,369.8	197.5	tons

While the procurement requirements are considerable, SB 1383 allows the City to meet the procurement target through a combination of recovered organic waste products. The City does not need to buy or use the organics products itself to meet this requirement. The City may contractually designate a public or private entity as a direct service provider (DSP) to meet the procurement obligation on behalf of the City. The City may also acquire recovered organic waste products through free distribution by a contractor and the City may provide procured organic waste products to residents in events such as compost/mulch giveaways.

In order to meet the procurement requirements, the City will need to determine what type or types of products are available and the amount of each type of product feasible for acquisitions and use.

*Transportation fuel.* The City does not have a fleet of vehicles that can meet this requirement via fuels and does not have access to RNG produced from organic waste.

*Energy from renewable gas.* The City does not currently have access to electricity or heat derived from renewable gas or biomass conversion. The City could explore the availability of opportunities for procurement of electricity from organic waste products with community partners including PG&E, Kompogas SLO and, come 2024 Central Coast Community Energy.

*Compost.* Currently, the Public Work’s Department utilizes a few cubic yards of compost per year. In order to reach the procurement goal, the City would need to utilize and/or

make available for residential giveaways a significantly larger amount of compost. The compost currently used may or may not be SB 1383 compliant. SB 1383 eligible compost must be produced at a compostable material handling operation or facility permitted or authorized under 14 CCR Chapter 3.1 of Division 7 or produced at a large volume in-vessel digestion facility that composts on-site as defined and permitted under 14 CCR Chapter 3.2 of Division 7 and meet the State's composting operations regulatory requirements. The City can explore Direct Service Provider agreements or look at the possibility of an organic waste flow agreement with a composting facility to secure the required amount of compost at a discounted rate. Researching local costs for eligible compost and utilizing estimates that other jurisdictions have provided, procurement of compost could cost the City between \$10-\$30 per cubic yard of compost, for an annual cost of between \$34,400 to \$105,000.

*Mulch.* Like compost, the Public Works Department utilizes a few cubic yards of mulch annually. A substantially larger amount of mulch would need to be utilized and/or made available for residential giveaways. The mulch currently used may or may not be SB 1383 compliant. Mulch is only SB 1383 eligible if produced at: (i) a compostable material handling operation or facility as defined in 14 CCR Section 17852(a)(12), that is permitted or authorized under 14 CCR Division 7, other than a chipping and grinding operation or facility as defined in 14 CCR Section 17852(a)(10); (ii) a transfer/processing facility or transfer/processing operation as defined in 14 CCR Sections 17402(a)(30) and (31), respectively, that is permitted or authorized under 14 CCR Division 7; or (iii) a solid waste landfill as defined in Public Resources Code Section 40195.1 that is permitted under 27 CCR Division 2. As above with compost, the City can explore DSP agreements or look at the possibility of an organic waste flow agreement with an eligible facility to secure the required amount of mulch at a discounted rate. Researching local costs for eligible mulch and utilizing estimates that other jurisdictions have provided, procurement of compost could cost could cost the City between \$30-\$90 per ton of mulch, for an annual cost of between \$70,000 to \$213,300.

Staff is currently gathering data needed to benchmark use of compliant recycled organic waste products. Developing a program that both meets the City's recovered organic waste product annual procurement target and uses the material will be challenging. Compost and mulch are currently the most readily available types of recovered organic waste products and are already in use by the City. While the City may enter into purchase agreements to procure the required tons of compost and/or mulch, the procurement target is anticipated to far exceed what is used and needed by the City. Additionally, only eligible product can be procured to count towards the procurement target. Key considerations with compost and mulch options are the current use by City departments, procurement of eligible product(s), capacity for use on managed lands, capacity and location for where storage of the compost/mulch, maintenance and security of the stored product(s) and the ultimate end use of the product(s).

Staff is also looking at what, if any, partnership opportunities are available to allow the City to meet its procurement target in an environmentally and fiscally sustainable way. Staff will work with Waste Management and Chicago Grade to look at options to obtain organic waste products that meet the SB 1383 procurement requirement. This may include providing a specified quantity of product(s) to the City and to residents through

giveaways. These types of arrangements with franchise waste haulers and landfills are being negotiated locally in franchise agreement amendments and statewide.

Should procurement requirements be met through compost and/or mulch, City staff will be required to keep detailed procurement records including:

- Dates product received
- How and where the product was used and applied
- Type, quantity and source of product
- Proof of purchase or acquisition
- Copy of enforceable mechanism (for mulch)
- Copy of agreement with DSP which includes definitions and specifications of the type of product and an enforcement mechanism for non-compliance with SB 1383 requirements.

While staff time is currently unknown, it is anticipated to be 5-10 hours weekly both for the procurement and use/application/giveaway of organic waste products as well as the recordkeeping requirements for the product use/application.

Staff will continue to assess all options to comply with the procurement requirement, including the procurement of both mulch and compost.

### **Recycled-content Paper and Paper Products**

SB 1383 regulations also require all City departments that purchase paper and paper products, including writing and copying paper and janitorial supplies such as tissue and paper towels, to procure 30% postconsumer recycled-content products that are also recyclable. The City must also require businesses providing the paper products to certify in writing to the percentage of post-consumer recycled material in the purchased product(s) and the products are eligible to be labeled with an unqualified recyclable label. The City may waive the certification if the required information is provided on the product label or through the vendor's catalog, invoice or website.

To meet the SB 1383 regulations, the City's policy will include a requirement that recycled paper and paper products be purchased where the fitness and quality are equal to non-recycled-content paper and paper products and the price is equal or less than non. The policy will also include record keeping responsibilities to track the purchase of recycled-content paper and paper products.

Given the SB 1383 requirements, and that purchasing is decentralized in the City, this is an added burden across all departments and divisions. All purchasers must now:

- Research the cost, fitness and recycled-content of all paper and paper products before purchase
- Document each product purchased including copies of the invoice or receipt, required certifications for recycled-content and recyclability or other verification of recycled-content, date purchased, quantity purchased, and recycled-content (including products that contain none)
- Include any justification for why a product was purchased that did not meet the recycled-content requirements or did not include the verification for recyclability

- Upload all documentation to a document repository within 30 days of purchase
- Request vendors providing printing services use best efforts to use paper meeting the SB 1383 recycled-content requirements

While the actual staff time required for compliance with the purchase of recycled-content paper and paper products is unknown, it is currently estimated that it will take roughly 5-10 hours weekly of staff time Citywide based on the number of purchasers and products purchased throughout the City.

### **Recordkeeping**

All documents supporting compliance with the recovered organic waste product purchases must be kept as part of the implementation record and provided to CalRecycle upon request. A department or individual will be required to be the designated record keeper for the City, responsible for tracking the procurement of recycled content paper and paper products and recovered organic waste products. This department or individual will be required to ensure all required documentation has been collected, collated, maintained and provided to IWMA monthly for compilation of the annual report on the City's procurement of recovered organic waste products and recycled-content paper and paper products.

In order to comply with SB1383, the City must now adopt a Recovered Organics Product Procurement Policy. The attached Draft Resolution amends the City's existing Purchasing Policy to add Chapter X, *Recovered Organic Waste Product Procurement*. No other changes to the Purchasing Policy are recommended at this time. The periodic update of the Purchasing Policy will be brought back before Council at a later date.

### **FISCAL IMPACT:**

The fiscal impact is currently unknown but is estimated to be significant. The estimated cost for procurement of recovered organic waste product(s) is between \$34,400 and \$213,300. There will be significant staff time required for the procurement of recovered organic waste products and recycled-content paper and paper products, use/application of the recovered organic waste products, and the record keeping and tracking requirements. It is currently estimated that the following Recovered Organic Waste Product Procurement compliance tasks will take 10-20 hours per week:

- The purchase and recordkeeping requirements for recycled-content paper and paper products
- Procurement, storage, application, giveaways and recordkeeping associated with recovered organic waste products
- Overall tracking and reporting for the implementation record

### **ATTACHMENTS:**

1. Recovered Organic Waste Product Procurement Policy
2. Draft Resolution

# RECOVERED ORGANIC WASTE PRODUCT PROCUREMENT POLICY

## Purpose.

It is the policy of the City, applicable to all departments and divisions, to incorporate environmental considerations including recycled-content and recovered Organic Waste product use into purchasing practices and procurement. This Recovered Organic Waste Product Procurement Policy (Policy) will help the City to:

1. Protect and conserve natural resources, water, and energy;
2. Minimize the City's contribution to climate change, pollution, and solid waste disposal; and,
3. Comply with State requirements as contained in 14 CCR Division 7, Chapter 12, Article 12 (SB 1383 procurement regulations) to procure a specified amount of Recovered Organic Waste Products to support Organic Waste disposal reduction targets and markets for products made from recycled and recovered Organic Waste materials, and to purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper.

## Definitions

- A. "Annual Recovered Organic Waste Product Procurement Target" means the amount of Organic Waste in the form of a Recovered Organic Waste Product that the City is required to procure annually under 14 CCR Section 18993.1. This target shall be calculated by multiplying the per capita procurement target, which shall be 0.08 tons of Organic Waste per California resident per year, times the City's residential population using the most recent annual data reported by the California Department of Finance. Annually, CalRecycle will provide notice to each City of its Annual Recovered Organic Waste Product Procurement Target by posting such information on CalRecycle's website and providing written notice directly to the Jurisdiction.
- B. "City" means the City of Atascadero, a municipal corporation acting through its City Council, and all the territory lying within the municipal boundaries of the City.
- C. "Compost" means the product resulting from the controlled biological decomposition of organic solid wastes that are source separated from the municipal solid waste stream or which are separated at a centralized facility or as otherwise defined in 14 CCR Section 17896.2(a)(4).

Compost eligible for meeting the Annual Recovered Organic Waste Product Procurement Target must be produced at a compostable material handling operation or facility permitted or authorized under 14 CCR Chapter 3.1 of Division

7 or produced at a large volume in-vessel digestion facility that composts on-site as defined and permitted under 14 CCR Chapter 3.2 of Division 7. Compost shall meet the State's composting operations regulatory requirements.

- D. "Direct Service Provider" means a person, company, agency, district, or other entity that provides a service or services to City pursuant to a contract or other written agreement or as otherwise defined in 14 CCR Section 18982(a)(17).
- E. "Electricity Procured from Biomass Conversion" means electricity generated from biomass facilities that convert recovered Organic Waste, such as wood and prunings from the municipal stream, into electricity. Electricity procured from a biomass conversion facility may only count toward the City's Annual Recovered Organic Waste Product Procurement Target if the facility receives feedstock directly from certain permitted or authorized compostable material handling operations or facilities, transfer/processing operations or facilities, or landfills, as described in 14 CCR Section 18993.1(i).
- F. "Organic Waste" means solid wastes containing material originated from living organisms and their metabolic waste products including, but not limited to, food, yard trimmings, organic textiles and carpets, lumber, wood, Paper Products, Printing And Writing Paper, manure, biosolids, digestate, and sludges, or as otherwise defined in 14 CCR Section 18982(a)(46). Biosolids and digestate are as defined in 14 CCR Section 18982(a)(4) and 14 CCR Section 18982(a)(16.5), respectively.
- G. "Paper Products" include, but are not limited to, paper janitorial supplies, cartons, wrapping, packaging, file folders, hanging files, corrugated boxes, tissue, and toweling; or as otherwise defined in 14 CCR Section 18982(a)(51).
- H. "Printing and Writing Papers" include, but are not limited to, copy, xerographic, watermark, cotton fiber, offset, forms, computer printout paper, white wove envelopes, manila envelopes, book paper, note pads, writing tablets, newsprint, and other uncoated writing papers, posters, index cards, calendars, brochures, reports, magazines, and publications; or as otherwise defined in 14 CCR Section 18982(a)(54).
- I. "Procurement of Recovered Organic Waste Products" shall mean purchase or acquisition (e.g., free delivery or free distribution from a hauler or other entity via a written agreement or contract), and end use by the City or others. The City's Annual Recovered Organic Waste Product Procurement Target can be fulfilled directly by the City or by Direct Service Providers through written contracts or agreements for Procurement of Recovered Organic Waste Products at the City's behest.
- J. "Publicly-Owned Treatment Works" or "POTW" has the same meaning as in Section 403.3(r) of Title 40 of the Code of Federal Regulations. For the purposes of this Policy, the POTW shall be the Water Reclamation Facility, 8005 Garbada Road, Atascadero, California 93422.

- K. “Recovered Organic Waste Products” means products made from California, landfill-diverted recovered Organic Waste processed at a permitted or otherwise authorized operation or facility, or as otherwise defined in 14 CCR Section 18982(a)(60). Products that can be used to meet the Annual Recovered Organic Waste Product Procurement Target shall include Compost, SB 1383 Eligible Mulch, Renewable Gas from an in-vessel digestion facility, and Electricity Procured from Biomass Conversion as described herein and provided that such products meet requirements of 14 CCR, Division 7, Chapter 12, Article 12.
- L. “Recordkeeping Designee” means the City Department or public employee appointed by the City Manager or their designee to track procurement and maintain records of Recovered Organic Waste Product procurement efforts both by the City and others, if applicable, as required by 14 CCR, Division 7, Chapter 12, Articles 12 and 13. The Recordkeeping Designee will report such records to the Reporting Designee.
- M. “Reporting Designee” means an entity that the City contracts with or otherwise arranges to carry out any of the City’s reporting responsibilities of this policy as authorized in 14 CCR.
- N. “Recyclability” means that the Paper Products and Printing and Writing Paper offered or sold to the City are eligible to be labeled with an unqualified recyclable label as defined in 16 Code of Federal Regulations Section 260.12 (2013).
- O. “Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper” means such products that consist of at least thirty percent (30%), by fiber weight, postconsumer fiber, consistent with the requirements of Sections 22150 to 22154 and Sections 12200 and 12209 of the Public Contract Code, and as amended.
- P. “Renewable Gas” means gas derived from Organic Waste that has been diverted from a landfill and processed at an in-vessel digestion facility that is permitted or otherwise authorized by 14 CCR to recover Organic Waste, or as otherwise defined in 14 CCR Section 18982(a)(62).
- Q. “SB 1383” means Senate Bill 1383 of 2016 approved by the Governor on September 19, 2016, which added Sections 39730.5, 39730.6, 39730.7, and 39730.8 to the Health and Safety Code, and added Chapter 13.1 (commencing with Section 42652) to Part 3 of Division 30 of the Public Resources Code, establishing methane emissions reduction targets in a statewide effort to reduce emissions of short-lived climate pollutants, as amended, supplemented, superseded, and replaced from time to time.
- R. “SB 1383 Regulations” or “SB 1383 Regulatory” means or refers to, for the purposes of this policy, the Short-Lived Climate Pollutants (SLCP): Organic Waste Reductions regulations developed by CalRecycle and adopted in 2020 that created Chapter 12 of 14 CCR, Division 7 and amended portions of regulations of 14 CCR and 27 CCR.

- S. “SB 1383 Eligible Mulch” means mulch eligible to meet the Annual Recovered Organic Waste Product Procurement Target, pursuant to 14 CCR Chapter 12 of Division 7. This SB 1383 Eligible Mulch shall meet the following conditions for the duration of the applicable procurement compliance year, as specified by 14 CCR Section 18993.1(f)(4):
1. Produced at one of the following facilities:
    - i. A compostable material handling operation or facility as defined in 14 CCR Section 17852(a)(12), that is permitted or authorized under 14 CCR Division 7, other than a chipping and grinding operation or facility as defined in 14 CCR Section 17852(a)(10);
    - ii. A transfer/processing facility or transfer/processing operation as defined in 14 CCR Sections 17402(a)(30) and (31), respectively, that is permitted or authorized under 14 CCR Division 7; or,
    - iii. A solid waste landfill as defined in Public Resources Code Section 40195.1 that is permitted under 27 CCR Division 2.
  2. Meet or exceed the physical contamination, maximum metal concentration, and pathogen density standards for land application specified in 14 CCR Sections 17852(a)(24.5)(A)1 through 3.
- T. “State” means the State of California.

## **Policies**

### **1.0 Recovered Organic Waste Product Procurement**

#### **1.1 Procurement Target**

- A. City will annually procure for use or giveaway a quantity of Recovered Organic Waste Products that meets or exceeds its Annual Recovered Organic Waste Product Procurement Target through the implementation of Sections 1.0 through 3.0 of this Policy.
- B. To be eligible to meet the Annual Recovered Organic Waste Product Procurement Target, products that may be procured include the following (provided that each product meets the criteria included in their respective definitions in this Policy):
1. SB 1383 eligible Compost (as defined in Section 2.C).
  2. SB 1383 Eligible Mulch (as defined in Section 2.S).
  3. Renewable Gas (in the form of transportation fuel, electricity, or heat) (as defined in Section 2.P).
  4. Electricity Procured from Biomass Conversion (as defined in Section 2.E).

## 1.2 Requirements for Direct Service Providers

A. Direct Service Providers of landscaping maintenance, renovation, and construction shall:

1. Use Compost and SB 1383 Eligible Mulch, as practicable, produced from recovered Organic Waste, as defined in Section 2.C and 2.S of this Policy, for all landscaping renovations, construction, or maintenance performed for the City, whenever available, and capable of meeting quality standards and criteria specified. SB 1383 Eligible Mulch used for land application shall comply with 14 CCR, Division 7, Chapter 12, Article 12 and must meet or exceed the physical contamination, maximum metal concentration and pathogen density standards specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).
2. If Direct Service Provider is subject to the City's Water Efficient Landscape Ordinance (WELO) pursuant to Atascadero Municipal Code Title 8, Chapter 10, the Direct Service Provider should comply with one of the following, whichever is more stringent: (i) the City's WELO if more stringent than the State's Model Water Efficient Landscape Ordinance (MWELo), or (ii) Sections 492.6 (a)(3)(B), (C), (D), and (G) of the State's MWELo, Title 23, Division 2, Chapter 2.7 of the CCR, as amended September 15, 2015, which requires the submittal of a landscape design plan with a "Soil Preparation, Mulch, and Amendments Section" to include the following:
  - a. For landscape installations, Compost at a rate of a minimum of 4 cubic yards per 1,000 square feet of permeable area shall be incorporated to a depth of six (6) inches into the soil. Soils with greater than six percent (6%) organic matter in the top six (6) inches of soil are exempt from adding Compost and tilling.
  - b. Apply a minimum three- (3-) inch layer of mulch on all exposed soil surfaces of planting areas except in turf areas, creeping or rooting groundcovers, or direct seeding applications where mulch is contraindicated. To provide habitat for beneficial insects and other wildlife, leave up to five percent (5%) of the landscape area without mulch. Designated insect habitat must be included in the landscape design plan as such.
  - c. Procure organic mulch materials made from recycled or post-consumer materials rather than inorganic materials or virgin forest products unless the recycled post-consumer organic products are not locally available. Organic mulches are not required where prohibited by local Fuel Modification Plan Guidelines or other applicable local ordinances.
  - d. For all mulch that is land applied, procure SB 1383 Eligible Mulch that meets or exceeds the physical contamination, maximum metal

concentration, and pathogen density standards for land applications specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).

3. Keep and provide records of Procurement of Recovered Organic Waste Products (either through purchase or acquisition) to Recordkeeping Designee, upon completion of projects. Information to be provided shall include:
    - a. General description of how and where the product was used and if applicable, applied;
    - b. Source of product, including name, physical location, and contact information for each entity, operation, or facility from whom the Recovered Organic Waste Products were procured;
    - c. Type of product;
    - d. Quantity of each product; and,
    - e. Invoice or other record demonstrating purchase or procurement.
- B. Direct Service Provider of Organic Waste collection services shall:
1. Provide a specified quantity of Compost or SB 1383 Eligible Mulch to City and its customers via periodic “giveaways” as specified in a franchise agreement or other agreement.
  2. Keep and provide records to the City including the following:
    - a. Dates provided;
    - b. Source of product including name, physical location and contact information for each entity, operation or facility from whom the Recovered Organic Waste Products were procured;
    - c. Type of product;
    - d. Quantity provided; and,
    - e. Invoice or other record or documentation demonstrating purchase, procurement, or transfer of material to giveaway location.
- C. Renewable Gas procurement by Direct Service Providers
1. Direct Service Providers transporting solid waste, organic materials, and/or recyclable materials shall procure their fuel as Renewable Gas as required to do so in RFPs and RFQs released by the City for such services or as required by permit, license, written agreement, or written contract with the City.

2. Departments releasing RFPs and RFQs for contractors that procure fuel in the course of their services to the City shall include a preference to contractors that propose to use the amount or percentage of Renewable Gas specified in the RFP or RFQ to be eligible for said price preference. Such use, if it occurs, shall be documented in a written contract or agreement.
3. If Renewable Gas made from recovered Organic Waste is used by Direct Service Providers, Direct Service Providers shall submit information listed in Section 1.2.B.2.a-e on a schedule to be determined by City, but not less than annually to the Recordkeeping Designee.
4. Renewable Gas used by Direct Service Providers under Sections 1.2.A and 1.2.B shall comply with criteria specified in 14 CCR Section 18993.1.

### **1.3 Requirements for City Departments**

- A. Compost and SB 1383 Eligible Mulch procurement. Divisions and departments responsible for landscaping maintenance, renovation, or construction shall:
  1. Use Compost and SB 1383 Eligible Mulch produced from recovered Organic Waste, as defined in C and S in the Definition section of this Policy, for landscaping maintenance, renovation, or construction, as practicable, whenever available, and capable of meeting quality standards and criteria specified. SB 1383 Eligible Mulch used for land application must meet or exceed the physical contamination, maximum metal concentration and pathogen density standards specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).
  2. When City uses Compost and SB 1383 Eligible Mulch and the applications are subject to the City's WELO, pursuant to Atascadero Municipal Code Title 8, Chapter 10, the City will comply with one of the following, whichever is more stringent, (i) the City's WELO, if more stringent than the State's MWELo, or (ii) Sections 492.6 (a)(3)(B), (C), (D), and (G) of the State's Model Water Efficient Landscape Ordinance, Title 23, Division 2, Chapter 2.7 of the CCR, as amended September 15, 2015, which requires the submittal of a landscape design plan with a "Soil Preparation, Mulch, and Amendments Section" to include the following:
    - a. For landscape installations, Compost at a rate of a minimum of 4 cubic yards per 1,000 square feet of permeable area shall be incorporated to a depth of six (6) inches into the soil. Soils with greater than six percent (6%) organic matter in the top six (6) inches of soil are exempt from adding Compost and tilling.
    - b. Apply a minimum three- (3-) inch layer of mulch on all exposed soil surfaces of planting areas except in turf areas, creeping or rooting groundcovers, or direct seeding applications where mulch is contraindicated. To provide habitat for beneficial insects and other

wildlife, leave up to five percent (5%) of the landscape area without mulch. Designated insect habitat must be included in the landscape design plan as such.

- c. Procure organic mulch materials made from recycled or post-consumer materials rather than inorganic materials or virgin forest products unless the recycled post-consumer organic products are not locally available. Organic mulches are not required where prohibited by local Fuel Modification Plan Guidelines or other applicable local ordinances.
  - d. For all mulch that is land applied, procure SB 1383 Eligible Mulch that meets or exceeds the physical contamination, maximum metal concentration, and pathogen density standards for land applications specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).
3. Keep records, including invoices or proof of Recovered Organic Waste Product procurement (either through purchase or acquisition), and submit records to the Recordkeeping Designee, upon completion of project.

Records shall include:

- a. General procurement records, including:
  - (i) General description of how and where the product was used and applied, if applicable;
  - (ii) Source of product, including name, physical location, and contact information for each entity, operation, or facility from whom the Recovered Organic Waste Products were procured;
  - (iii) Type of product;
  - (iv) Quantity of each product; and,
  - (v) Invoice or other record demonstrating purchase or procurement.
- b. For Compost and SB 1383 Eligible Mulch provided to residents through giveaway events or other types of distribution methods, keep records of the Compost and SB 1383 Eligible Mulch provided to residents. Records shall be maintained and submitted to the Recordkeeping Designee in accordance with the requirements specified in Section 1.3.A.3.a.
- c. For procurement of SB 1383 Eligible Mulch, maintain an updated copy of the ordinance or enforceable mechanism(s) requiring that the mulch procured by the City or Direct Service Provider meets the land

application standards specified in 14 CCR Section 18993.1, as it may be amended from time to time.

4. When Procurement of Recovered Organic Waste Products occurs through a Direct Service Provider, enter into a written contract, franchise agreement, or other agreement or execute a purchase order with enforceable provisions that includes: (i) definitions and specifications for SB 1383 Eligible Mulch, Compost, Renewable Gas, and/or Electricity Procured from Biomass Conversion; and, (ii) an enforcement mechanism (e.g., termination, liquidated damages) in the event the Direct Service Provider is not compliant with the requirements.
- B. Renewable Gas procurement (used for fuel for transportation, electricity, or heating applications). For Renewable Gas procurement, City shall:
1. Procure Renewable Gas made from recovered Organic Waste for transportation fuel, electricity, and heating applications to the degree that it is appropriate and available for the City and to help meet the Annual Recovered Organic Waste Product Procurement Target, which requires compliance with criteria specified in 14 CCR Section 18993.1.
  2. Keep records in the same manner indicated in Section 1.3.A.3 for the amount of Renewable Gas procured and used by the Jurisdiction, including the general procurement record information specified in Section 1.3.A.3.a, and submit records to the Recordkeeping Designee on a schedule prescribed by the Recordkeeping Designee. City shall additionally obtain the documentation and submit records specified in Section 1.3.B.3 below, if applicable.
  3. If the City procures Renewable Gas from a POTW,
    - a. Annually verify that the Renewable Gas from the POTW complies with the requirements specified in 14 CCR Section 18993.1(h), including, but not limited to the exclusion in 14 CCR Section 17896.6(a)(1) and the items listed in this Section 1.3.B.3.
    - b. Annually receive a record from the POTW documenting the tons of Organic Waste received by the POTW from: (i) a compostable material handling operation or facility as defined in 14 CCR Section 17852(a)(12), other than a chipping and grinding operation or facility as defined in 14 CCR Section 17852(a)(10), that is permitted or authorized under 14 CCR Division 7; (ii) transfer/processing facility or transfer/processing operation as defined in 14 CCR Sections 17402(a)(30) and (31), respectively, that is permitted or authorized under 14 CCR Division 7; or (iii) a solid waste landfill as defined in Public Resources Code Section 40195.1 that is permitted under 27 CCR Division 2.

- c. Annually receive documentation from the POTW of the percentage of biosolids that the POTW produced and transported to activities that constitute landfill disposal in order to demonstrate that the POTW transported less than twenty-five percent (25%) of the biosolids it produced to activities that constitute landfill disposal. For the purposes of this Policy, landfill disposal is defined pursuant to 14 CCR Section 18983.1(a) and includes final disposition at a landfill; use of material as alternative daily cover or alternative intermediate cover at a landfill, and other dispositions not listed in 14 CCR Section 18983.1(b). Alternative daily cover or alternative intermediate cover are defined in 27 CCR Sections 20690 and 20700, respectively.
- d. Annually receive documentation that the POTW receives vehicle-transported solid waste that is an anaerobically digestible material for the purpose of anaerobic co-digestion with POTW treatment plant wastewater to demonstrate that the POTW meets the requirement of 14 CCR Section 18993.1(h)(2).
- e. City shall submit these records to the Recordkeeping Designee and Reporting Designee on a schedule to be determined by the Reporting Designee.

C. Electricity Procured from Biomass Conversion. For Electricity Procured from Biomass Conversion, City shall:

- 1. Procure electricity from a biomass conversion facility that receives feedstock from a composting facility, transfer/processing facility, a solid waste landfill, and/or receives feedstock from the generator (or employees on behalf of the generator) of the Organic Waste and to the degree that it is available and practicable for the City and to help meet the Annual Recovered Organic Waste Product Procurement Target, which requires compliance with criteria specified in 14 CCR Section 18993.1.
- 2. Maintain records and conduct the following recordkeeping activities:
  - a. Keep records in the same manner indicated in Section 1.3.A.3 of this Policy for the amount of Electricity Procured from Biomass Conversion facilities, including the general procurement record information specified in Section 1.3.A.3.a.
  - b. Receive written notification by an authorized representative of the biomass conversion facility certifying that biomass feedstock was received from a permitted solid waste facility identified in 14 CCR Section 18993.1(i).
  - c. Provide these records to the Recordkeeping Designee.

## **2. Recycled-content Paper Procurement**

### **2.1 Requirements for City Departments**

- A. Comparable or more favorable pricing. If fitness and quality of Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper are equal to that of non-recycled items, all departments and divisions of City shall purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, whenever available at the same or a lesser total cost than non-recycled items, consistent with the requirements of the Public Contracts Code, Sections 22150 through 22154 and Sections 12200 and 12209, as amended.
- B. All Paper Products and Printing and Writing Paper shall be eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available from vendor.
- C. Provide records to the Recordkeeping Designee of all Paper Products and Printing and Writing Paper purchases within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by a division or department or employee of the City. Records shall include a copy of the invoice or other documentation of purchase, written certifications as required in Section 2.2.A.3-4 for recycled-content purchases, vendor name, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non-Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.

### **2.2 Requirements for Contracted Vendors**

- A. All contracted vendors that provide Paper Products (including janitorial Paper Products) and Printing and Writing Paper to City shall:
  - 1. Provide Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, if fitness and quality are equal to that of non-recycled item, and if they are available at an equal or lesser price.
  - 2. Only provide Paper Products and Printing and Writing Papers that meet Federal Trade Commission Recyclability standard as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available.
  - 3. Certify in writing, under penalty of perjury, the minimum percentage of postconsumer material in the Paper Products and Printing and Writing Paper offered or sold to the Jurisdiction. This certification requirement may be waived if the percentage of postconsumer material in the Paper Products, Printing and Writing Paper, or both can be verified by a product label, catalog, invoice, or a manufacturer or vendor internet website.

4. Certify in writing, under penalty of perjury, that the Paper Products and Printing and Writing Paper offered or sold to the City is eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available.
  5. Provide records to the purchasing department, as requested, of all Paper Products and Printing and Writing Paper purchased from the vendor within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by a division or department or employee of the City. Records shall include a copy of the invoice or other documentation of purchase, written certifications as required in Section 2.2.A.3-4 for recycled-content purchases, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non-Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.
- B. All vendors providing printing services to the City via a printing contract or written agreement, shall make best efforts to use Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, or as amended by Public Contract Code Section 12209.

### **3. Recordkeeping Responsibilities**

- A. A department or public employee, as determined by the City Manager, will be the responsible department or person to act as the Recordkeeping Designee that will be responsible for obtaining records pertaining to Procurement of Recovered Organic Waste Products and Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper, as well as reporting such records to the Reporting Designee.
- B. The Recordkeeping Designee and/or Reporting Designee will do the following to track Procurement of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper:
1. Collect and collate copies of invoices or receipts (paper or electronic) or other proof of purchase that describe the procurement of Printing and Writing Paper and Paper Products, including the volume and type of all paper purchases; and, copies of certifications and other required verifications from all departments and/or divisions procuring Paper Products and Printing and Writing Paper (whether or not they contain recycled content) and/or from the vendors providing Printing and Writing Paper and Paper Products. These records must be kept as part of City's documentation of its compliance with 14 CCR Section 18993.3.
  2. Collect and collate copies of invoices or receipts or documentation evidencing procurement from all departments and divisions procuring Recovered Organic Waste Products and invoices or similar records from

vendors/contractors/others procuring Recovered Organic Waste Products on behalf of the City to develop evidence of City meeting its Annual Recovered Organic Waste Product Procurement Target. These records must be kept as part of the City's documentation of its compliance with 14 CCR Section 18993.1.

3. Collect, collate, and maintain documentation submitted by the City, Direct Service Providers, and/or vendors, including the information reported to the Recordkeeping Designee in accordance with Sections 1.2.A.3, 1.2.B.2, 1.2.C.2, 1.3.A.3, 1.3.B.2, 1.3.C.3, 2.1.C, and 2.2.A.5.
4. Compile an annual report on the City's direct procurement, and vendor/other procurement on behalf of the City, of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper, consistent with the recordkeeping requirements contained in 14 CCR Section 18993.2 for the Annual Recovered Organic Waste Product Procurement Target and 14 CCR Section 18993.4 for Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper procurement. This report shall be made available to the City's responsible entity for compiling the annual report to be submitted to CalRecycle (which will include a description of compliance on many other SB 1383 regulatory requirements) pursuant to 14 CCR Division 7, Chapter 12, Article 13.

**DRAFT RESOLUTION**

**RESOLUTION OF THE CITY COUNCIL  
OF THE CITY OF ATASCADERO, CALIFORNIA,  
AMENDING THE PURCHASING POLICY TO ADD A NEW SECTION  
FOR THE PROCUREMENT OF RECOVERED ORGANIC WASTE  
PRODUCTS IN COMPLIANCE WITH SENATE BILL 1383**

**WHEREAS**, the basic purchasing policy of the City of Atascadero is to obtain quality supplies, services, vehicles and equipment needed for the proper operation of its various divisions at the lowest possible overall cost; and

**WHEREAS**, this includes maintaining a purchasing system that ensures maximum use of fair and open competition and receipt of the best value for funds available, consistent with applicable laws and regulations; and

**WHEREAS**, the City Council has previously adopted Resolution No. 2018-008, setting forth the City's procurement policies and procedures, and desires to amend and restate this Resolution, to add a Recovered Organic Waste Product Procurement Policy, without rescinding said adoption; and

**WHEREAS**, in September 2016, Governor Brown signed into law Senate Bill 1383 (SB 1383) establishing methane reduction targets in an effort to curb the presence of methane emissions caused by organic waste; and

**WHEREAS**, SB 1383, the Short-lived Climate Pollutant Reduction Act of 2016, requires jurisdictions to procure, annually, a certain quantity of recovered organic waste products and to purchase recycled-content paper products; and

**WHEREAS**, adoption of a Recovered Organic Waste Product Procurement Policy will assist the City in reaching compliance with SB 1383 procurement requirements; and

**WHEREAS**, CalRecycle finalized regulations to achieve goals set forth by SB 1383 in November 2020; and

**WHEREAS**, SB 1383 became effective on January 1, 2022, and local jurisdictions are required to enact regulations set forth in SB 1383 and provide a copy of the Recovered Organic Waste Product Procurement Policy to CalRecycle by April 1, 2022.

**NOW, THEREFORE BE IT RESOLVED**, by the City Council of the City of Atascadero:

**SECTION 1. Recitals.** The foregoing recitals are true and correct and the City Council so finds and determines.

**SECTION 2. Purchasing Policy.** The Purchasing Policy (Exhibit A) on file in the City Clerk's Office and incorporated herein by this reference shall become part of this Resolution.

**SECTION 3. Effective Date.** This Resolution shall take effect upon its adoption and shall remain in effect until revised by the City Council.

ITEM NUMBER: C-2  
DATE: 3/22/22  
ATTACHMENT: 2

**PASSED AND ADOPTED** at a regular meeting of the City Council held on the \_\_\_\_\_ day of \_\_\_\_\_, 2022.

On motion by Council Member \_\_\_\_\_ and seconded by Council Member \_\_\_\_\_, the foregoing Resolution is hereby adopted in its entirety on the following roll call vote:

AYES:  
NOES:  
ABSENT:  
ABSTAIN:

CITY OF ATASCADERO

\_\_\_\_\_  
Heather Moreno, Mayor

ATTEST:

\_\_\_\_\_  
Lara K. Christensen, City Clerk

APPROVED AS TO FORM:

\_\_\_\_\_  
Brian A. Pierik, City Attorney

# City of Atascadero



## Purchasing Policy

~~April 10, 2018~~ March 22, 2022

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## **SECTION I** **GENERAL**

### **PURPOSE AND SCOPE**

This document defines the procurement policies and procedures for the City of Atascadero.

### **1.0 GENERAL PROVISIONS**

The basic purchasing policy of the City of Atascadero is to obtain quality supplies, services, vehicles and equipment needed for the proper operation of its various divisions at the lowest possible overall cost. This includes maintaining a purchasing system that ensures maximum use of fair and open competition and receipt of the best value for funds available, consistent with applicable laws and regulations.

The purchasing functions are decentralized, with each Department/Division responsible for compliance with City policies and procedures. Purchasing responsibility and authority shall be delegated to the lowest possible level consistent with good business practice and sound financial management policy to the extent practical.

The following apply to all purchases made by the City of Atascadero:

1. No purchase will be approved or undertaken unless an appropriation has been established, through either the adopted annual budget or City Council approval of additional appropriations. It is the responsibility of the Department/Division to maintain budget control of their individual budgets. Ultimate responsibility for the individual budget rests with the Department Director.
2. All purchases shall be of the quality deemed necessary to suit the intended purpose, suitable and beneficial to the City, and in the City's best interest.
3. Competitive quotations will be sought based on established dollar limits. Established dollar limits and procedures for specific purchase types are set out in this policy as follows:

General Supplies and Equipment- Section II

Proprietary Equipment and Goods- Section III

General Trade Services- Section IV

Professional Services- Section V

Public Works Contracts- Section VI

## Section I – GENERAL

### **1.0 GENERAL PROVISIONS (continued)**

Travel- Section VII

Petty Cash- Section VIII

Disposal of Assets- Section IX

4. Certain purchases are unique in nature and do not lend themselves to the process of competitive bidding. Therefore, these items are excluded from the competitive bidding and purchase order requirements in Sections II through VI. These items include, but are not limited to, County Services, debt service payments, and ongoing expenses for utilities or services (such as telephones, services agreements, etc.). The bill or invoice should be forwarded to the Administrative Services Director for authorization.
5. The dollar limits for purchases and bids are established by ordinance or resolution. Purchases shall not be split to avoid the required procedures or certain dollar limits.
6. Receipt of goods or services will be verified and approved by the appropriate official prior to payment of invoices.
7. The emergency purchase of goods is authorized under certain conditions.
8. The City Council may waive by majority vote any provision within this policy.
9. No purchase of supplies, services, or equipment over \$30,000.00 shall be made without an authorized purchase order unless exempted in these guidelines. Otherwise:
  - 9.1 Such purchases are void and not considered an obligation of the city.
  - 9.2 Invoices without an authorized purchase order may be returned to the vendor unpaid.
10. No City employee shall have a direct or indirect financial interest in any contract or purchase of goods or services entered into by the City, or shall derive any personal benefit from the City's purchase of goods or services.
11. No City employee shall use the City's purchasing procedures to obtain property for personal use, by misrepresenting to vendors for the purpose of obtaining price discounts that the personal purchases are for the City.
12. No City employee shall draft or cause to be drafted any specifications for bids in such a way as to intentionally limit the bidding directly or indirectly to any one bidder, except for the sole source procurement.

## **Section I – GENERAL**

### **1.0 GENERAL PROVISIONS (continued)**

#### 13. Local Vendor Preferences

- 13.1 Although no preferences are available to Public Works projects, a five percent (5%) variance will be allowed for the purchase of operating equipment, supplies, and trade services from vendors located within City limits.
- 13.2 When soliciting informal quotes, local vendors should be used whenever practical. Use of non-local vendors should be limited to those vendors with a clearly demonstrated advantage in terms of expertise, product, service and/or price.
- 13.3 Local Vendor is defined in a relative sense: a vendor located in Atascadero is more “local” than one from the North County. A North County vendor is more “local” than one from San Luis Obispo City. But a vendor from San Luis Obispo County is still more “local” than other counties or states.
- 13.4 For purposes of the five percent variance, only businesses with an Atascadero address and a business license (if required) are eligible.

### **2.0 FEDERAL, STATE AND OTHER GRANT PROGRAMS**

Federal, State, or grant programs may require special conditions that are more stringent than City procedures. It is the responsibility of the department accepting the grant to ensure that all grant provisions are complied with.

### **3.0 SIGNATURE AUTHORIZATION**

1. Each Department Head shall complete and forward to Administrative Services a Signature Authorization form, identifying those employees approved by the Department Head to sign off on various financial and other administrative documents and the amount of such signature authorizations. The form shall be developed by the Administrative Services Director and revised from time to time as needed.
2. The form shall identify specific Departments, Divisions or Programs, the employee’s name and signature and list specific documents each employee is authorized to sign and the amount authorized to sign. It is the Department Head’s responsibility to keep the information current. The Administrative Services Director shall approve all forms.
3. Any documents missing the appropriate signature(s) will be returned to the originating department.

## Section I – GENERAL

### **3.0 SIGNATURE AUTHORIZATION (continued)**

4. Only Regular or Probationary City employees are authorized to sign off on documents obligating the City to expend public monies. Temporary or Volunteer employees, or individuals under contract with the City, may be able to acquire items but any receipts must be countersigned by an authorized employee.
5. The number of authorized signatures should be kept to a minimum, to assure better control over departmental appropriations.

### **4.0 DEPARTMENT RESPONSIBILITIES**

It is the responsibility of the acquiring Department/Division to:

1. Make purchases in accordance with established policies and procedures.
2. Verify that an appropriation is available for the purchase.
3. Anticipate the Department/Divisions' needs well in advance in order to minimize the need for emergency purchases.
4. Review goods and services received to ensure conformity with purchase order or contract.
5. When a cost discrepancy for goods or services dissatisfaction arises, notify the Administrative Services Department. No bill should be processed for payment when the goods or services are unsatisfactory, or there is a price discrepancy between the originally quoted price and the bill received.

### **5.0 PAYMENT AUTHORIZATION**

1. An authorized signature on the invoice, receipt or other backup shall be considered authorization for payment. The signature shall indicate that the signer has:
  - Verified that the City has received the goods or services in good working condition.
  - Verified that the purchase complies with this purchasing policy and that funds are available for the purchase.
2. In certain instances it may be in the City's best interest to issue payment prior to receipt of the authorizing signature on the invoice. The City Manager or the Director of Administrative Services may authorize payment in those instances.
3. Checks shall be processed and issued by an employee other than check signer.
4. All payments in excess of \$25,000 shall require two live signatures on the checks.

**Section II**  
**GENERAL SUPPLIES, MATERIALS**  
**AND EQUIPMENT**

**PURPOSE**

Provide guidelines for the purchase of general supplies, materials and equipment. Supplies, materials and equipment shall consist of any and all articles or things which shall be furnished to or used by any department, excluding proprietary equipment and goods (Section III) and any goods purchased as part of a Public Works Project (Section VI).

In instances where goods and services are purchased together from one vendor, this section shall only apply if the predominant portion of the purchase is goods. (i.e. A purchase of equipment for \$1,000 with a \$300 installation fee would be covered under this section of the policy. A repair of equipment with \$1,000 in labor and \$300 in parts would be covered under Section IV- General Trade Services)

**POLICIES**

There are three levels of authority for normal purchases: Department/Division Award, City Manager Award, and City Council Award. Generally, authority is established by the dollar amount of the purchase.

**1.0 DEPARTMENT/DIVISION AWARD < \$30,000.01**

The Department/Division manager may authorize the purchase of supplies, equipment, or services as needed up to \$30,000.

These purchases do not require competitive bidding and departments are given considerable discretion in these purchases.

**2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00**

Material/supply purchases over \$30,000 and under \$100,000.01 must be awarded by the City Manager or the Director of Administrative Services. Informal bidding should be used to assure the most competitive price is received for an item, while avoiding the additional time and expense involved in formal bidding.

2.1 Informal Quotes:

The Department shall make every attempt to receive at least three bids in writing or over the phone.

## Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

- a) Phone Bids: Phone bids must be documented to the satisfaction of the Director of Administrative Services. Ideally, documentation should include the name of the company bidding, the person giving the quote, the date and time of the phone call, the amount quoted and any other relevant information.
- b) Three Quotes: The Department should make every reasonable attempt to obtain at least three bids, however it is understood that at times it is neither practical nor cost effective to continue soliciting quotes until three bids are received. In the event that three viable quotes are not received, the Department shall document what steps were taken to obtain quotes, any vendors contacted that declined to bid, and if applicable, why it is not practical to receive three quotes.
- c) Exceptions: The informal bid process may be bypassed with Department Head and City Manager or the Director of Administrative Services approval in the following four instances:
  - 1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining three informal quotes to obtain materials necessary in dealing with the emergency. Immediately following the emergency, the Department Head shall forward a copy of the purchase order along with an explanation to the City Manager or the Director of Administrative Services.
  - 2. When one known supplier is available, the Department Head shall document that it is a “sole source” purchase. Most sole source purchases shall be the result of the City deciding that it is in its best interest to use a specific proprietary brand item. (i.e. For ease of maintenance, the City may choose to only purchase one brand of computers).
  - 3. When there exists other governmental contracts that were competitively bid (such as State Contracts, DGS, etc.) that the City is eligible to use.
  - 4. When an item has been bid within the last 36 months and the price has not changed.
- d) Evaluating Bids: The Department shall evaluate the three informal quotes received and determine the lowest most responsive bid. The City reserves the right to accept that bid which is in the best interest of the City. When selecting the recommended bidder the Department Head will take into consideration:
  - 1. Price.
  - 2. Ability, capacity, and skill.
  - 3. Ability to meet time requirements.
  - 4. Character, integrity, and reputation.
  - 5. Previous vendor experience.

## **Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT**

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

d) Evaluating Bids (continued):

6. Financial resources available for contract performance.
7. Ability to provide future maintenance and service, if necessary.

#### 2.2 Purchase Order

A purchase order shall be prepared detailing the vendor name, address, item being purchased, total price including tax and shipping, and budget account to be charged. The purchase order shall be signed and dated by the Department Head.

The purchase order packet shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the informal bid summary. He/she will review the purchase order packet for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order.

#### 2.3 Purchasing Item

Once the Department has received the approved Purchase Order from the City Manager or the Director of Administrative Services, they may contact the vendor and purchase the item. Items must generally be shipped to a City address or worksite. If the product will be shipped to an alternate location, this should be cleared through the Administrative Services Department in advance.

#### 2.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original material/supply purchase that result in less than a \$100,000 overall contract amount. Change orders in excess of the \$100,000 total contract amount shall be brought to the City Council for approval.

## Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT

### **3.0 CITY COUNCIL AWARD > \$100,000.00**

Material/supply purchases over \$100,000 must be awarded by the City Council. Formal bidding should be used to assure all possible vendors are given the opportunity to bid on major City purchases, thereby assuring the City that it has received the most competitive price. The formal process generally takes more time and expense than informal bidding and in some instances may actually not be the most cost-effective approach.

#### 3.1 Formal Bidding

The initiating Department shall be responsible for completion of the formal bid process, however the process shall be coordinated with the City Clerk's Office and the Administrative Services Department.

- a) Bid Forms: The initiating department shall prepare a bid form including detailed specifications for the item to be purchased. The following format is suggested for competitive bids
1. Submission of bids (or proposals) – Include date, time, location and bid number as assigned by the City Clerk. Include a detailed list of the information the bid or proposal should contain.
  2. Questions – List the name, address, and telephone number of the person to be contacted concerning questions about the project.
  3. Background – Provide as much background as necessary to give the bidder an understanding of the environment in which the job will be performed and to which the job relates.
  4. Scope of work – Describe in detail the requirement for the job and detail specification.
  5. Desired project schedule – Be as specific as possible.
  6. Minimum and desirable qualifications – Be as specific as possible.
  7. Performance Bond – Whether a performance bond is required and if so, the amount and form of bidders security.
- b) Notice Inviting Bids: The initiating department shall also prepare a notice inviting bids that includes the following:
1. A general description of the item to be purchased.
  2. A statement indicating where bid forms, specifications and bonding requirements can be obtained.
  3. A statement specifying the time and place for the opening of the bid.

## Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

- b) Notice Inviting Bids (continued)
4. Per California Public Contract Code Section 20164, the first publication of the notice shall be at least ten days before the date of opening the bids. The notice shall be published at least twice, not less than five days apart, in a newspaper of general circulation, printed and published in the City. The notice may also be sent to all applicable vendors.
- c) Bid Opening
1. Sealed bids shall be submitted to the City Clerk's office and shall be clearly identified with the Bid number on the envelope. Faxed or other electronic bids are not acceptable.
  2. Bids shall be opened in public at the time and place stated in the public notice.
  3. The City Clerk or his/her designee shall open the bids and shall record all bids received.
  4. Any bid received after the time specified in the notice shall be rejected.
  5. When a bidder's security is required, it will be announced in the public notice inviting bids. The amount shall be determined at the time of preparation of the bid. It shall be in the form of cash, certified or cashier's check, certificate of deposit in City of Atascadero's name, or bid bond made payable to the City of Atascadero. When a bidder's security is required, a bid shall not be considered unless one of the aforementioned forms of security accompanies the bid. Bidders shall be entitled to return of the bid security with the following exception:
    - The successful bidder must execute the contract and file acceptable documents within thirty (30) calendar days from the date of award unless extended by the City Manager. Failure to execute the contract shall be just cause for annulment of the award and forfeiture of the bidder's security, not as a penalty, but as liquidated damages. The City Council may, upon refusal or failure of the successful bidder to execute the contract, award the contract to the next lowest responsible bidder.
  6. All bids received shall be available for inspection during regular business hours in the City Clerk's office for a period of not less than thirty (30) calendar days after the bid opening.
- d) Rejection of Bids: The City reserves the right to reject any and all bids, to accept or reject any one or more items of a bid, or to waive any irregularities or informalities in the bids or the bidding process if to do so is deemed to best serve the interests of the City.

## Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

- e) Determining Lowest Responsible Bidder: Award of bid shall be to the lowest responsible bidder. All valid responsive bids shall be considered in determining the lowest bid. The City reserves the right to accept that bid which is in the best interest of the City. When selecting the recommended bidder the Department Head will take into consideration:
1. Price.
  2. Ability, capacity, and skill.
  3. Ability to meet time requirements.
  4. Character, integrity, and reputation.
  5. Previous vendor experience.
  6. Financial resources available for contract performance.
  7. Ability to provide future maintenance and service, if necessary.
- f) Local Vendor Preference: The City has established a policy that provides for a five percent (5%) preference to local bidders and vendors. (See Section I – General Policies). This is accomplished by reducing the local vendors' bids by 5% when comparing such bids to those of other bidders.
- g) Tie Bids: If tie bids are received, quality and service being equal, the contract shall be awarded to a local bidder.
- If the above condition is not applicable, the City may, at its discretion:
1. Reject any and all bids presented and re-advertise; or
  2. If the public interest will not permit the delay of re-advertising for bids, the City may accept either one or accept the lowest bid made by negotiation with the tie bidders; or
  3. Award the bid to any one of the low tie bidders by public drawing.
- h) Exceptions to Formal Bidding: The formal bid process may be bypassed in the following four instances:
1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining formal quotes to obtain materials necessary in dealing with the emergency. Immediately following the emergency, the appropriate Department Head shall prepare a report to Council explaining the emergency and the items purchased.
  2. When one known supplier is available, the Department Head shall prepare a report for Council approval requesting an exemption from the formal bidding procedures and if applicable awarding the bid to the "sole source."
  3. When there exists other governmental contracts that were competitively bid (such as State Contracts, DGS, etc.) that the City is eligible to use in lieu of a formal bid.

## Section II – GENERAL SUPPLIES, MATERIALS AND EQUIPMENT

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### h) Exceptions to Formal Bidding (continued)

4. When there are extenuating circumstances that would make formal bidding not the most cost effective approach. This often relates to qualitative, artistic or proprietary software/technological issues. The appropriate Department Head shall prepare a report to Council requesting an exemption from the formal bidding procedures.

#### 3.2 Awarding the Bid

Once the bids have been evaluated, the Department Head shall prepare a report to Council recommending the most responsible bidder. The Council shall then award the bid in a public meeting.

Except for urgencies all contracts exceeding \$100,000.00 must be awarded by the City Council. Otherwise:

- Such purchases are void and not considered an obligation of the City.
- Invoices may be returned to the contractor/service provider unpaid.
- The person ordering the unauthorized purchase may be held personally liable for the costs of the contract.

#### 3.3 Purchase Order

- a) A purchase order shall also be prepared detailing the vendor's name, address, the item being purchased, and the estimated total price including tax and shipping of the item being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- b) The entire purchase order shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the Staff Report. He/she will review the purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. shall then be forwarded to the originating Department.

#### 3.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original material/supply purchase that result in less than a 25% aggregate change in contract price. Change orders in excess of 25% shall be brought to the City Council for approval.

### **Section III**

## **PROPRIETARY EQUIPMENT AND GOODS**

### **PURPOSE**

Provide guidelines for the purchase of equipment/software and other artistic goods that may only be purchased through a proprietary vendor. There is no bidding requirement for this type of purchase, since the item is being purchased based on qualification, rather than price.

Proprietary vendors are those vendors that directly sell their products and do not use distributors or other outlets. (i.e. Inforum software may only be purchased through Eden Systems, therefore it would be a “proprietary purchase” and covered under this section. Microsoft Word may be purchased at many different stores and therefore not a “proprietary purchase”)

### **POLICIES**

There are three levels of authority for normal purchases: Department/Division Award, City Manager Award, and City Council Award. Generally, authority is established by the dollar amount of the purchase.

#### **1.0 DEPARTMENT/DIVISION AWARD < \$30,000.01**

The Department/Division manager may authorize the purchase of proprietary goods as needed up to \$30,000.

These purchases do not require competitive bidding and departments are given considerable discretion in these purchases.

#### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00**

Proprietary purchases over \$30,000 and under \$100,000.01 must be awarded by the City Manager or the Director of Administrative Services. These purchases shall have sufficient documentation of background analysis to support the purchase. Informal solicitation of qualifications should be used to assure quality goods are received for a reasonable price.

## SECTION III – PROPRIETARY EQUIPMENT AND GOODS

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

#### 2.1 Informal Product Review

The Department shall make every attempt to review at least three products/qualifications in writing, over the phone, or in person.

- a) Documentation- Informal product review must be documented to the satisfaction of the City Manager or the Director of Administrative Services. Ideally, documentation should include:
  1. The name of the company
  2. Pros/Cons of the product
  3. Estimated Price
  4. The person giving the quote
  5. The date and time of the phone call
  6. Brief justification for the selection of the goods
- b) Review of Three Products: The Department should make every reasonable attempt to review at least three products; however it is understood that at times it is not practical or possible to review the products. In the event that three products are not reviewed, the Department shall document why it is not practical to review alternate products.
- c) Exception: The informal product review process may be bypassed with Department Head and City Manager or the Director of Administrative Services approval in the following instance:
  1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with informal product review process to obtain items necessary in dealing with the emergency. Immediately following the emergency, the Department Head shall forward a copy of the purchase order and contract along with an explanation to the City Manager or the Director of Administrative Services.
- d) Evaluating Products: The Department Head or designee(s) shall select the product which, in their evaluation process, is the best solution for the City.
- e) Negotiation: The Department Head or designee(s) shall discuss with the highest ranked vendor the requirements of the City and negotiate a reasonable fee for the product/items being purchased.

## **SECTION III – PROPRIETARY EQUIPMENT AND GOODS**

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

#### 2.2 Contract and Purchase Order

- a) A contract shall be prepared and two original copies shall be signed by the consultant and the Department Head.
- b) A purchase order shall also be prepared detailing the vendor's name, address, the item being purchased, and the estimated total price including tax and shipping of the item being purchased and budget account to be charged. The purchase order shall be signed and dated by the authorized Department Head.
- c) The entire purchase order and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the informal bid summary. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. and one original copy of the executed contract shall then be forwarded to the originating Department.

#### 2.3 Executing the Contract

Once the Department has received the approved Purchase Order and an original copy of the contract from the City Manager or the Director of Administrative Services, they may make arrangements with the vendor for purchase of the product.

#### 2.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original purchase of proprietary equipment and goods that result in less than a \$100,000 overall contract amount. Change orders in excess of the \$100,000 total contract amount shall be brought to the City Council for approval.

### **3.0 CITY COUNCIL AWARD > \$100,000.00**

Proprietary purchases exceeding \$100,000 must be awarded by the City Council. A more formal evaluation should be used, thereby assuring the City that it has purchased the best product fit for the City. The formal process generally takes more time and expense than informal solicitations and in some instances may actually not be the most cost-effective approach.

## SECTION III – PROPRIETARY EQUIPMENT AND GOODS

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Evaluation of Products/Goods:

- a) To ensure maximum exposure and competition, the responsible department shall prepare a list of potential firms from which to solicit quotes. City staff shall make reasonable efforts to ensure that small business firms, located in San Luis Obispo County, are aware of the purchase.
- b) A Selection Committee shall be formed to evaluate the submitted data and determine the products that should receive further consideration. The Committee shall be appointed by the Department Head, subject to the approval of the City Manager or the Director of Administrative Services, and may consist of more than one department.
  1. The Selection Committee may choose to interview all of the responding vendors, only the top few ranking vendors or to not perform interviews.
  2. The Selection Committee may also choose to view demonstrations of all of the products (either at a working site or at the City), only the top few ranking products or to not view demonstrations.
  3. After the interviews, demonstrations and site visits (as applicable), the Selection Committee shall rank the products.

Negotiation: The Department Head or designee(s) shall discuss with the highest ranked vendor the requirements of the City and negotiate a reasonable fee/contract.

Exceptions to Formal Bidding: The formal bid process may be bypassed in the following four instances:

1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining formal quotes to obtain materials necessary in dealing with the emergency. Immediately following the emergency, the appropriate Department Head shall prepare a report to Council explaining the emergency and the items purchased.
2. When there are extenuating circumstances that would make formal bidding not the most cost effective approach. This often relates to qualitative, artistic or proprietary software/technological issues. The appropriate Department Head shall prepare a report to Council requesting an exemption from the formal bidding procedures.

## SECTION III – PROPRIETARY EQUIPMENT AND GOODS

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.2 Awarding the Contract:

The Department Head shall prepare a report to Council recommending the top ranked product. The Council shall then award the purchase in a public meeting.

Except for urgencies all contracts exceeding \$100,000.00 must be awarded by the City Council. Otherwise:

- Such purchases are void and not considered an obligation of the City.
- Invoices may be returned to the contractor/service provider unpaid.
- The person ordering the unauthorized purchase may be held personally liable for the costs of the contract.

#### 3.3 Contract and Purchase Order

- a) A contract may be prepared as applicable and two original copies shall be signed by the vendor.
- b) A purchase order shall also be prepared detailing the vendor's name, address, item being purchased, estimated total price including tax and shipping of the item being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The City Attorney shall sign the two original copies of the contract, approving it as to form.
- d) The City Manager or his/her Council designee shall sign the two original copies of the contract, approving it as to form.
- e) The entire purchase order and both copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the Staff Report. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order.
- f) One copy of the executed contract shall be returned to the contractor/service provider and the other original shall remain in the City Clerk's Office. A copy of the executed contract shall be sent to the initiating department and a copy to the Administrative Services Department.

## **SECTION III – PROPRIETARY EQUIPMENT AND GOODS**

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original purchase of proprietary equipment and goods that result in less than a 25% aggregate change in contract price. Change orders in excess of 25% shall be brought to the City Council for approval.

## **Section IV** **GENERAL TRADE SERVICES**

### **PURPOSE**

Provide guidelines for the purchase of trade contractual services. Trade services shall mean the repair, rental or maintenance of equipment, machinery and other City-owned or operated property. Included within this term are services necessary for the routine operation, repair or maintenance of existing buildings or improvements. **The term does not include services rendered by professionals and other services which are unique in nature and not subject to competition.**

In instances where goods and trade services are purchased together from one contractor/service provider, this section shall only apply if the predominant portion of the purchase is services (i.e. repair of equipment with \$1,000 in labor and \$300 in parts would be covered under this section of the policy. A purchase of equipment for \$1,000 with a \$300 installation fee would be covered under Section II- General Supplies, Materials and Equipment).

### **POLICIES**

There are three levels of authority for normal purchases: Department/Division Award, City Manager Award, and City Council Award. Generally, authority is established by the dollar amount of the purchase.

#### **1.0 DEPARTMENT/DIVISION AWARD < \$30,000.01**

The Department/Division manager may authorize the purchase of services as needed up to \$30,000 per project or annually (for ongoing maintenance contracts) as applicable. Projects that would typically be performed by one contractor/service provider may not be split into components in order to avoid purchasing limits.

These purchases do not require competitive bidding and departments are given considerable discretion in these purchases.

The Department/Division will obtain a completed IRS form W-9 from the contractor/service provider prior to awarding the contract. The W-9, shall immediately be forwarded to the Administrative Services department in order to comply with State Reporting Requirements.

## SECTION IV – GENERAL TRADE SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00**

Trade service awards over \$30,000 and under \$100,000.01 must be awarded by the City Manager or the Director of Administrative Services. Informal bidding should be used to assure the most competitive price is received for an item, while avoiding the additional time and expense involved in formal bidding.

#### 2.1 Informal Quotes:

The Department shall strive to receive three bids in writing or over the phone, whenever possible.

- a) Documentation: Bids received over the phone or in writing must be documented to the satisfaction of the City Manager or the Director of Administrative Services. Ideally, documentation should include the name of the company bidding, the person giving the quote, the date and time of the contact, the amount quoted and any other relevant information.
- b) Exceptions: The informal bid process may be bypassed with Department Head and City Manager or the Director of Administrative Services approval in the following five instances:
  1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining three informal quotes to obtain services necessary in dealing with the emergency. Immediately following the emergency, the Department Head shall forward a copy of the purchase order along with an explanation to the City Manager or the Director of Administrative Services.
  2. When one known service provider is available, the Department Head shall document that it is a “sole source” purchase.
  3. When there exists other governmental contracts that were competitively bid (such as State Contracts, DGS, etc.) that the City is eligible to use.
  4. When an item has been bid within the last 36 months and the price has not changed.
  5. When it is not practical nor cost effective to continue soliciting quotes until three bids are received, the Department Head at his/her discretion may choose the vendor best suited for the needs of the particular project.
- c) Evaluating Bids: The Department shall evaluate the three informal quotes received and determine the lowest most responsive bid. The City reserves the right to accept that bid which is in the best interest of the City.

## SECTION IV – GENERAL TRADE SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (Continued)**

c) Evaluating Bids (continued):

When selecting the recommended bidder the Department Head will take into consideration:

1. Price.
2. Ability, capacity, and skill.
3. Ability to meet time requirements.
4. Character, integrity, and reputation.
5. Previous contractor/service provider experience.
6. Financial resources available for contract performance.
7. Ability to provide future maintenance and service, if necessary.

#### 2.2 Contract and Purchase Order

- a) A contract shall be prepared and two original copies shall be signed by the contractor/service provider and Department Head.
- b) A purchase order shall also be prepared detailing the contractor/service provider name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the contractor/service provider.
- d) The entire purchase order, the W-9 and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the informal bid summary. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. and one original copy of the executed contract shall then be forwarded to the originating Department.

#### 2.3 Executing the Contract

Once the Department has received the approved Purchase Order and an original copy of the contract from the City Manager or the Director of Administrative Services, they may make arrangements with the contractor/service provider for services.

## SECTION IV – GENERAL TRADE SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (Continued)**

#### 2.4 Renewals

Contracts for ongoing services may include annual renewal provisions for up to five years, however in no instance may the contract exceed \$100,000.00 in any one year. Cost increases related to such renewals shall not exceed the Consumer Price Index (CPI) adjustments unless approved in advance by the City Manager.

#### 2.5 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a \$100,000 annual contract amount. Change orders in excess of the \$100,000 contract amount shall be brought to the City Council for approval.

### **3.0 CITY COUNCIL AWARD > \$100,000.00**

Trade service contracts exceeding \$100,000 must be awarded by the City Council. Formal bidding should be used to assure all possible contractor/service providers are given the opportunity to bid on major City contracts, thereby assuring the City that it has received the most competitive price. The formal process generally takes more time and expense than informal bidding and in some instances may actually not be the most cost-effective approach.

#### 3.1 Formal Bidding

The initiating Department shall be responsible for completion of the formal bid process, however the process shall be coordinated with the City Clerk's Office and the Administrative Services Department.

- a) Bid Forms: The initiating department shall prepare a bid form including detail specifications for the services to be purchased. The following format is suggested for competitive bids:
  1. Submission of bids (or proposals) – Include date, time, location and bid number as assigned by the City Clerk. Include a detail list of the information the bid or proposal should contain.
  2. Questions – List the name, address, and telephone number of the person to be contacted concerning questions about the project.
  3. Background - Provide as much background as necessary to give the bidder an understanding of the environment in which the job will be performed and to which the job relates.
  4. Scope of work – Describe in detail the requirement for the job and detail specification

## SECTION IV – GENERAL TRADE SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (Continued)**

- a) Bid Forms (continued)
5. Desired project schedule – Be as specific as possible.
  6. Minimum and desirable qualifications – Be as specific as possible.
  7. Performance Bond- Whether a performance bond is required and if so, the amount and form of bidders security.
  8. Sample Contract- A sample of the contract that is expected to be used should be included in the bid package.
- b) Notice Inviting Bids: The initiating department shall also prepare a notice inviting bids that includes the following:
1. A general description of the services to be purchased.
  2. A statement indicating where bid forms, specifications and bonding requirements can be obtained.
  3. A statement specifying the time and place for the opening of the bids.
  4. Per California Public Contract Code Section 20164, the first publication of the notice shall be at least ten days before the date of opening the bids. The notice shall be published at least twice, not less than five days apart, in a newspaper of general circulation, printed and published in the City. The notice may also be sent to all applicable contractor/service providers.
- c) Bid Opening
1. Sealed bids shall be submitted to the City Clerk's office and shall be clearly identified with the Bid number on the envelope. Faxed or other electronic bids are not acceptable.
  2. Bids shall be opened in public at the time and place stated in the public notice.
  3. The City Clerk or his/her designee shall open the bids and shall record all bids received.
  4. Any bid received after the time specified in the notice shall be rejected.
  5. When a bidder's security is required, it will be announced in the public notice inviting bids. The amount shall be determined at the time of preparation of the bid. It shall be in the form of cash, certified or cashier's check, certificate of deposit in the City of Atascadero's name or bid bond made payable to the City of Atascadero. When a bidder's security is required, a bid shall not be considered unless one of the aforementioned forms of security accompanies the bid. Bidders shall be entitled to return of the bid security with the following exception:
    - The successful bidder must execute the contract and file acceptable documents within thirty (30) calendar days from the date of award unless

## SECTION IV – GENERAL TRADE SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (Continued)**

extended by the City Manager. Failure to execute the contract shall be just cause for annulment of the award and forfeiture of the bidder's security, not as a penalty, but as liquidated damages. The City Council may, upon refusal or failure of the successful bidder to execute the contract, award the contract to the next lowest responsible bidder.

6. All bids received shall be available for inspection during regular business hours in the City Clerk's office for a period of not less than thirty (30) calendar days after the bid opening.
- d) Rejection of Bids: The City reserves the right to reject any and all bids, to accept or reject any one or more items of a bid, or to waive any irregularities or informalities in the bids or the bidding process if to do so is deemed to best serve the interests of the City.
- e) Determining Lowest Responsible Bidder: Award of bid shall be to the lowest responsible bidder. All valid responsive bids shall be considered in determining the lowest bid. The City reserves the right to accept that bid which is in the best interest of the City. When selecting the recommended bidder the City staff will take into consideration:
  1. Price.
  2. Ability, capacity, and skill.
  3. Ability to meet time requirements.
  4. Character, integrity, and reputation.
  5. Previous contractor/service provider experience.
  6. Financial resources available for contract performance.
  7. Ability to provide future maintenance and service, if necessary
- f) Local Contractor/Service Provider Preference: The City has established a policy that provides for a five percent (5%) preference to local bidders and contractor/service providers. (See Section I – General Policies). This is accomplished by reducing the local contractor/service providers' bids by 5% when comparing such bids to those of other bidders.
- g) Tie Bids: If tie bids are received, quality and service being equal, the contract shall be awarded to a local bidder.

If the above condition is not applicable, the City may, at its discretion:

1. Reject any and all bids presented and re-advertise; or
2. City may accept either one or accept the lowest bid made by negotiation with the tie bidders; or
3. Award the bid to any one of the low tie bidders by public drawing.

## SECTION IV – GENERAL TRADE SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (Continued)**

- h) Exceptions to Formal Bidding: The formal bid process may be bypassed in the following four instances:
1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining formal quotes to obtain services necessary in dealing with the emergency. Immediately following the emergency, the appropriate Department Head shall prepare a report to Council explaining the emergency and the items purchased.
  2. When one known service provider is available, the Department Head shall prepare a report for Council approval requesting an exemption from the formal bidding procedures and if applicable awarding the bid to the “sole source.”
  3. When there exists other governmental contracts that were competitively bid that the City is eligible to use in lieu of a formal bid.
  4. When there are extenuating circumstances that would make formal bidding not the most cost effective approach. This often relates to qualitative, artistic or proprietary software/technological issues. The appropriate Department Head shall prepare a report to Council requesting an exemption from the formal bidding procedures.
- i) Ongoing Professional Services
1. In some instances it is in the best interest of the City to have current ongoing contracts with multiple consultants for the same or very similar services. (i.e. services that can be defined as to scope of work but not as to required events such as contract planning services, public safety investigations, soils testing, contract building inspections services, etc.) These services would best be handled by establishing an eligibility list and by entering into annual ongoing professional service contracts.
  2. The process for selecting firms for annual ongoing professional service contracts shall be generally the same as for other professional services contracts, however multiple firms may be awarded an ongoing contract based on the RFP/RFQ process and may be placed on the eligibility list. Additional firms/individuals may also be awarded contracts and placed on the eligibility list at a later date, using the RFP/RFQ process without impacting contracts currently in place.
  3. Council shall award each ongoing contract that is expected to exceed \$100,000.00 at a public meeting.
  4. As events occur and need arises, work will be assigned to the consultants on the eligibility list at the sole discretion of the Department Head. The Department Head, however, shall make a reasonable attempt to rotate work between consultants subject to availability and special needs.

## SECTION IV – GENERAL TRADE SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (Continued)**

- j) Negotiation: The Department Head or designee(s) shall discuss with the highest ranked firm(s) the requirements of the project, the scope of services needed to meet the requirements, and negotiate a reasonable fee/contract for the established work assignment.

#### 3.2 Awarding the Bid

Once the bids have been evaluated, the Department Head shall prepare a report to Council recommending the most responsive bid. The Council may then award the bid in a public meeting.

Except for urgencies all contracts exceeding \$100,000.00 must be awarded by the City Council. Otherwise:

- Such purchases are void and not considered an obligation of the city.
- Invoices may be returned to the contractor/service provider unpaid.
- The person ordering the unauthorized purchase may be held personally liable for the costs of the contract.

#### 3.3 Contract and Purchase Order

- a) A contract shall be prepared and the contractor/service provider shall sign the two original copies.
- b) A purchase order shall also be prepared detailing the contractor/service provider name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the contractor/service provider.
- d) Proof of insurance in accordance with the contract shall be obtained.
- e) The City Attorney shall sign the two original copies of the contract approving it as to form.
- f) The City Manager or his/her Council designee shall sign the two original copies of the contract approving it as to form.
- g) The entire purchase order, the W-9, proof of insurance and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and signature and should include a copy of the Staff Report.
- h) One original copy of the executed contract shall be returned to the contractor/service provider and the other original shall remain in the City Clerk's Office. A copy of the executed contract shall be sent to the initiating department and a copy to the Administrative Services Department.

## **SECTION IV – GENERAL TRADE SERVICES**

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (Continued)**

#### 3.4 Renewals

Contracts for ongoing services may include annual renewal provisions for up to five years.

#### 3.5 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a 25% change in annual contract price. Change orders in excess of 25% shall be brought to the City Council for approval.

### **4.0 UTILITIES AND OTHER SERVICE AGREEMENTS**

Items that cannot be purchased under the procedures above or ongoing expenses for utilities or services (such as telephones, services agreements, etc.) do not require a Purchase Order. The bill or invoice should be forwarded to Administrative Services with an authorized signature and account number to be charged.

## **SECTION V** **PROFESSIONAL SERVICES**

### **PURPOSE**

Provide guidelines for the purchase of professional services. Professional services are those activities performed by a consultant who possesses a high degree or expertise in a particular profession. This would generally include (but not be limited to) architectural services, accounting/auditing services, environmental services, design services, engineering services, technical services, financial services, legal services, economic services and other administrative services. There is no bidding requirement for this type of service, since the agent is being hired based on his/her qualifications, not the lowest bid. Since local vendors are important to the City's overall economic health, special consideration should be given to local vendors whenever possible. Local vendors should be included when sending out bid packages. When vendor selection is between two qualified firms, the local vendor should have preference.

### **POLICIES**

There are three levels of authority for normal purchases: Department/Division Award, City Manager Award, and City Council Award. Generally, authority is established by the dollar amount of the purchase.

#### **1.0 DEPARTMENT/DIVISION AWARD < \$30,000.01**

The Department/Division Head may authorize the purchase of professional services as needed up to \$30,000 per project or annually (for ongoing/recurring contracts) as applicable. Projects which would typically be performed by one consultant may not be split into components in order to avoid purchasing limits.

These purchases do not require competitive bidding and departments are given considerable discretion in these purchases.

The Department/Division will obtain a completed IRS form W-9 from the contractor/service provider prior to awarding the contract. The W-9, shall immediately be forwarded to the Administrative Services Department in order to comply with State Reporting Requirements.

#### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00**

Professional service contracts over \$30,000 and under \$100,000.01 must be awarded by the City Manager or the Director of Administrative Services. These professional service agreements shall have sufficient documentation of background analysis to support the

## SECTION V – PROFESSIONAL SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

contract. Informal solicitation of qualifications should be used to assure quality services are received for a reasonable price.

#### 2.1 Informal Solicitation of Qualifications:

The Department shall strive to, whenever possible, solicit at least three qualifications/proposals in writing or over the phone. When it is not practical, nor cost effective to receive three qualifications/proposals in writing or over the phone, the Department Head at his/her discretion, may choose the vendor best suited for the needs of the particular project. It is important that the specifications are accurate and comprehensive, thus it may be beneficial to transmit the specifications and responses in written format even when the proposal is received verbally.

- a) Documentation- Informal quotations must be documented to the satisfaction of the City Manager or the Director of Administrative Services. Ideally, documentation should include
  1. The name of the company
  2. The person giving the quote
  3. The date and time of the phone call/communication
  4. Understanding of the required scope of services.
  5. Specialized experience of the firm and its personnel relative to the required services.
  6. References who can be contacted to verify past record of performance, i.e., completion of a quality product, in a timely manner, and within budget constraints.
  7. The capacity of the firm to perform the subject project within a required timeframe.
  8. Estimated Price
- b) Exceptions: The informal bid process may be bypassed with Department Head and City Manager or the Director of Administrative Services approval in the following instances:
  1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with obtaining three informal quotes to obtain services necessary in dealing with the emergency. Immediately following the emergency, the Department Head shall forward a copy of the purchase order and contract along with an explanation to the City Manager or the Director of Administrative Services.

## SECTION V – PROFESSIONAL SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

#### 2.1 Informal Solicitation of Qualifications: (continued)

2. When one known service provider is available, the Department Head shall document that it is a “sole source” purchase.
  3. When an item has been bid within the last 36 months and the price has not changed.
  4. When there exists other governmental contracts that were competitively bid (such as State Contracts, DGS, etc.) that the City is eligible to use.
  5. When it is not practical nor cost effective to continue soliciting quotes until three bids are received, the Department Head at his/her discretion may choose the vendor best suited for the needs of the particular project.
- c) Evaluating Bids: The Department Head or designee(s) shall select the consultant which, in their evaluation process, is the most qualified to perform the work. The evaluation and selection process shall be based upon the following considerations:
1. General quality and responsiveness to the request, including but not limited to:
    - Responsiveness to the terms, conditions, and items of performance;
    - Grasp of the problem, work to be performed, and approach to be used.
  2. Organization and personnel making the proposal;
    - Evidence of good organizational and management practices.
    - Qualification of the personnel.
    - Specialized experience of the firm and its personnel relative to the required services.
    - References who can be contacted to verify past record of performance (i.e., completion of a quality product in a timely manner and within budget constraints).
    - Previous consultant experience.
    - The financial condition of the firm.
    - Capacity of the firm to perform the subject project within a required timeframe.
  3. If appropriate, the price, in any of the following formats, may be considered.
    - Total price and price breakdown.
    - Price range.
    - Cost schedule.

## SECTION V – PROFESSIONAL SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 to \$100,000.00 (continued)**

#### 2.1 Informal Solicitation of Qualifications: (continued)

- d) Ongoing Professional Services: In some instances it is in the best interest of the City to have current ongoing contracts with multiple consultants for the same or very similar services. (i.e. services that can be defined as to scope of work but not as to required events such as contract planning services, public safety investigations, design engineering, soils testing, contract building inspections services, etc.) These services would best be handled by establishing an eligibility list and by entering into ongoing professional service contracts.

The process for selecting firms for ongoing professional service contracts shall be generally the same as for other professional services contracts, however multiple consultants may be awarded an ongoing contract based on the informal process and may be placed on the eligibility list. Additional consultants may also be awarded contracts and placed on the eligibility list at a later date, using the informal process without impacting contracts currently in place.

As events occur and need arises, work will be assigned to the firms/individuals on the eligibility list at the sole discretion of the Department Head.

- e) Negotiation: The Department Head or designee(s) shall discuss with the highest ranked firm(s) the requirements of the project, the scope of services needed to meet the requirements, and negotiate a reasonable fee for the established work assignment.

#### 2.2 Contract and Purchase Order

- a) A contract shall be prepared and two original copies shall be signed by the consultant and the Department Head.
- b) A purchase order shall also be prepared detailing the consultant's name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the authorized Department Head.
- c) The Department will obtain a completed IRS form W-9 from the consultant.
- d) The entire purchase order, the W-9 and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the informal bid summary. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. and one original copy of the executed contract shall then be forwarded to the originating Department.

## SECTION V – PROFESSIONAL SERVICES

### **2.0 CITY MANAGER AWARD \$30,000.01 TO \$100,000.00 (continued)**

#### 2.3 Executing the Contract

Once the Department has received the approved Purchase Order and an original copy of the contract from the City Manager or the Director of Administrative Services, they may make arrangements with the consultant for services.

#### 2.4 Renewals

Contracts for ongoing professional services may include annual renewal provisions for up to five years; however, in no instance may the contract exceed \$100,000.00 in any one year. Cost increases related to such renewals shall not exceed the Consumer Price Index (CPI) adjustments unless approved in advance by the City Manager.

#### 2.5 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a less than \$100,000 annual contract amount. Change orders in excess of the \$100,000 contract amount shall be brought to the City Council for approval.

### **3.0 CITY COUNCIL AWARD > \$100,000.00**

Professional service contracts exceeding \$100,000 must be awarded by the City Council. A Formal Request for Proposal (RFP) or a Request for Qualifications (RFQ) process should be used, thereby assuring the City that it has engaged the most qualified consultant available for the engagement. The formal process generally takes more time and expense than informal solicitations of qualifications and in some instances may actually not be the most cost-effective approach.

#### 3.1 Formal Request for Proposal or Request for Qualifications:

- a) Developing the RFP or RFQ: Because RFP's and RFQ's ask for a subjective product, they should contain the greatest detail possible, and may include the following:
  1. A precise description of the problem or objective
  2. The services to be performed
  3. The product to be provided

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### a) Developing the RFP or RFQ (continued)

4. The anticipated time schedule for:
  - Submittal of RFP/RFQ (date and time)
  - Any pre-proposal conference (date, time and location)
  - Review and evaluation of the proposals
  - Award of the contract
  - Commencement of work on the project
  - Completion date
5. Evaluation factors and the relative importance of each.
6. Expectations or limitations on the part of the City, i.e.
  - The format, form and quantity of any expected reports
  - The extent/nature of assistance/cooperation available from the City
7. Expected content of the RFP/RFQ, including:
  - The overall description of techniques to be used
  - Listing of similar services provided to other clients
  - Listing of available references to contact
  - Description and qualifications of assigned lead and supporting personnel
  - Time and staff expected to be expended
  - Facilities and equipment to be used
  - Portion of contract to be performed by sub-contractors
  - Subcontractors/Subconsultants qualifications
  - Cost, in summary and total, and desired method of payment. The RFP/RFQ for services may, but is not required to, state the amount budgeted for the service.
8. Contractual requirements including, but not limited to:
  - Prohibition against assignment
  - Indemnification
  - Insurance requirements

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### a) Developing the RFP or RFQ (continued)

##### 8. Contract Requirements (continued)

- Bonding requirements
- Warranties
- Compliance with federal, state and City laws, rules and regulations
- Compliance with any grant related regulations
- Sample contract

9. Construction project management service RFP's may require evidence be provided of experience in construction project design review and evaluation, construction mobilization and supervision, bid evaluation, project scheduling, cost-benefit analysis, claims review and negotiation, and general management and administration of a construction project.

##### b) Issuing the RFP/RFQ

1. To ensure maximum exposure and competition, the responsible department shall prepare a list of potential firms to receive the RFP/RFQ. City staff shall make reasonable efforts to ensure that small business firms, located in San Luis Obispo County, are aware of the RFP/RFQ's issued.
2. If required or desired, the responsible department will submit the RFP/RFQ notice to be advertised in a local newspaper of general circulation. The notice will be published one or more times beginning at least fourteen calendar days prior to the designated closing. Additional advertisements may be placed in a regional newspaper of general circulation; appropriate professional or trade journals; and state or governmental publications designed for public notice.
3. A reasonable length of time between solicitation and closing dates must be allowed to provide potential respondents time for preparation in accordance with the complexity, the size of the project, and the scope of advertising.
4. City staff may conduct conferences to explain the requirements of the project. A sufficient amount of time should be allowed after the RFP/RFQ has been issued to allow potential respondents to become familiar with the project. Any clarification or changes required to the RFP/RFQ, as a result of the conference, shall be added as a written addendum. A summary of the conference shall be provided to all prospective respondents receiving the request.

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### b) Issuing the RFP/RFQ (continued)

5. The department shall maintain a list of questions regarding the RFP/RFQ's received and responses.
6. Addenda should be used to make any changes in quantities, descriptions, schedules, or to correct defects or ambiguities in the original RFP/RFQ. Addenda are provided to ensure that all potential respondents are furnished with the same information with which to prepare proposals.

Addenda to the RFP/RFQ shall be identified as such and shall require acknowledgment as such by firms receiving the RFP/RFQ. Addenda shall be sent to all known recipients of the RFP/RFQ within a reasonable time period before the closing date. If the time and date established for the receipt of proposals does not allow sufficient time for consideration and changes, the time and date will be modified by addendum.

##### c) Proposal Opening:

1. Proposals shall be submitted to the City Clerk's office and shall be clearly identified with the Proposal number on the envelope. Faxed or other electronic proposals are not acceptable.
2. Proposals received by 5:00 p.m. of the designated closing day will be opened on the following workday for preliminary review.
3. Any proposal received after the time specified in the RFP/RFQ shall be returned unopened.
4. To avoid disclosure of the contents of competing RFPs/RFQs, proposals will be opened in the presence of City Clerk or his/her designee and the Department Head or the Director of Administrative Services, requesting the proposals.
5. Respondents may modify or withdraw their proposals prior to the established closing date and time, without penalty. However, any modifications submitted after the established closing date and time will not be accepted. Such modifications will be returned to the respondent, unopened.

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### c) Issuing the RFP/RFQ (continued)

6. The City Clerk's office shall maintain a list of proposals received, including name and address of respondent, the number of modifications received, if any, and any additional information requested. The register will be open to inspection after the award of the contract or the rejection of all proposals.
7. Proposals and modifications shall be shown only to the evaluation committee personnel, the City Clerk or his/her designee, and the Department Head (or the Director of Administrative Services) until a recommendation is made to Council or all proposals have been rejected.

d) Rejection of Proposals: The City reserves the right to reject any and all proposals, to accept or reject any one or more items of a proposal, or to waive any irregularities or informalities in the proposal or the RFP/RFQ process if to do so is deemed to best serve the interests of the City.

e) Evaluation Factors and Method: Because unique services are requested, cost is not considered the primary selection criteria.

##### 1. Evaluation factors may include:

- General quality and responsiveness of the proposal, including but not limited to:
  - Responsiveness to the terms, conditions, and items of performance.
  - Completeness and thoroughness of the proposal.
  - Grasp of the problem, work to be performed, and approach to be used.
- Organization and personnel making the proposal:
  - Evidence of good organizational and management practices.
  - Qualification of the personnel.
  - Specialized experience of the firm and its personnel relative to the required services.
  - References who can be contacted to verify past record of performance, i.e., completion of a quality product, in a timely manner, and within budget constraints.
  - The financial condition of the firm.
  - Capacity of the firm to perform the subject project within a required time frame.

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### e) Evaluation Factors and Method (continued)

1. Evaluation factors may include: (continued)
  - If appropriate, the price, in any of the following formats, may be considered.
    - Total price and price breakdown.
    - Price range.
    - Cost schedule.
2. A Selection Committee shall be formed to evaluate the submitted data and determine the products that should receive further consideration. The Committee shall be appointed by the Department Head, subject to the approval of the City Manager or the Director of Administrative Services, and may consist of more than one department.
3. The Selection Committee may choose to interview all of the responding consultants, only the top few ranking consultants or to not perform interviews.
4. After the interviews (if applicable), the Selection Committee shall rank the consultants based on their proposals, interviews, and references.

##### f) Exceptions to Formal RFP/RFQ: The formal RFP/RFQ process may be bypassed in the following three instances:

1. In emergency situations where time is of the essence, the appropriate Department Head may dispense with the formal RFP/RFQ process to obtain services necessary in dealing with the emergency. Immediately following the emergency, the appropriate Department Head shall prepare a report to Council explaining the emergency and the items purchased.
2. When one known service provider is available, the Department Head shall prepare a report for Council approval requesting an exemption from the formal RFP/RFQ procedures and if applicable awarding the bid to the “sole source”.
3. When there are extenuating circumstances that would make the formal RFP/RFQ process not the most cost effective approach. This often relates to qualitative, artistic or proprietary software/technological issues. The appropriate Department Head shall prepare a report to Council requesting an exemption from the formal bidding procedures.

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.1 Formal Request for Proposal or Request for Qualifications: (continued)

##### g) Ongoing Professional Services

1. In some instances it is in the best interest of the City to have current ongoing contracts with multiple consultants for the same or very similar services. (i.e. services that can be defined as to scope of work but not as to required events such as contract planning services, public safety investigations, soils testing, contract building inspections services, etc.) These services would best be handled by establishing an eligibility list and by entering into annual ongoing professional service contracts.
2. The process for selecting firms for annual ongoing professional service contracts shall be generally the same as for other professional services contracts, however multiple firms may be awarded an ongoing contract based on the RFP/RFQ process and may be placed on the eligibility list. Additional firms/individuals may also be awarded contracts and placed on the eligibility list at a later date, using the RFP/RFQ process without impacting contracts currently in place.
3. Council shall award each ongoing contract that is expected to exceed \$100,000.00 at a public meeting.
4. As events occur and need arises, work will be assigned to the consultants on the eligibility list at the sole discretion of the Department Head. The Department Head, however, shall make a reasonable attempt to rotate work between consultants subject to availability and special needs.

- h) Negotiation: The Department Head or designee(s) shall discuss with the highest ranked firm(s) the requirements of the project, the scope of services needed to meet the requirements, and negotiate a reasonable fee/contract for the established work assignment.

#### 3.2 Awarding the Contract:

The Department Head shall prepare a report to Council recommending the most responsible consultant. The Council shall then award the contract in a public meeting.

## SECTION V – PROFESSIONAL SERVICES

### **3.0 CITY COUNCIL AWARD > \$100,000.00 (continued)**

#### 3.2 Awarding the contract (continued)

Except for urgencies all contracts exceeding \$100,000.00 must be awarded by the City Council. Otherwise:

- Such purchases are void and not considered an obligation of the city.
- Invoices may be returned to the contractor/service provider unpaid.
- The person ordering the unauthorized purchase may be held personally liable for the costs of the contract.

#### 3.3 Contract and Purchase Order

- a) A contract shall be prepared and the consultant shall sign the two original copies.
- b) A purchase order shall also be prepared detailing the consultant's name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the consultant.
- d) Proof of insurance in accordance with the contract shall be obtained.
- e) The City Attorney shall sign the two original copies of the contract approving it as to form.
- f) The City Manager or his/her Council designee shall sign the two original copies of the contract approving it as to form.
- g) The entire purchase order, the W-9, proof of insurance and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and signature and should include a copy of the Staff Report.
- h) One original copy of the executed contract shall be returned to the contractor/service provider and the other original shall remain in the City Clerk's Office. A copy of the executed contract shall be sent to the initiating department and a copy to the Administrative Services Department.

#### 3.4 Renewals

Contracts for ongoing services may include annual renewal provisions for up to five years.

#### 3.5 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a 25% change in annual contract price. Change orders in excess of 25% shall be brought to the City Council for approval.

## **SECTION VI** **PUBLIC PROJECTS**

### **PURPOSE**

Provide guidelines for “Public Project” procurement. **Public Project** means construction, reconstruction, erection, alteration, restoration, improvement, demolition, and repair work involving any facility owned, leased, or operated by the City. The definition also includes painting or repainting any facility owned, leased or operated by the City. Construction, erection, improvement, or repair of dams, reservoirs, and electrical transmission lines of 230,000 volts and higher that are owned by the City, are considered a public project.

A public project does not include maintenance work, consisting of routine, recurring, and usual work for the preservation or protection of facilities owned or operated by the City, including minor repainting. Street and highways resurfacing at less than one inch (1”) deep, landscape maintenance (mowing, watering, trimming, pruning, planting, replacement of plants, and servicing of irrigation and sprinkler systems) are not a public project.

### **POLICIES**

It is the City of Atascadero’s policy to follow the uniform Construction Cost Accounting Procedures for all Public Projects, as set forth in the Public Contract Code (Article 2, commencing with Section 22010).

It is also the City of Atascadero’s policy to adopt the purchasing limits and policies as set forth in Public Contract Code Sections 22030 to 22045. (Appendix A)

### **1.0 DEPARTMENT/DIVISION AWARD < \$30,000.01**

The Department/Division manager may contract public projects as needed up to \$30,000 per project or may be performed by the employees of the City by force account. Projects which would typically be performed by one contractor may not be split into components in order to avoid purchasing limits.

These purchases do not require competitive bidding and departments are given considerable discretion in these purchases.

The Department/Division will obtain a completed IRS form W-9 from the contractor prior to awarding the contract. The W-9, shall immediately be forwarded to the Administrative Services Department in order to comply with State Reporting Requirements.

## SECTION VI– PUBLIC PROJECTS

### **2.0 CITY MANAGER AWARD LEVEL I \$30,000.01 TO \$45,000.00<sup>1</sup>**

Public Projects contracts over \$30,000 and under \$45,000.01<sup>1</sup> must be awarded by the City Manager or the Director of Administrative Services. The Department Head may recommend a contractor without using the informal bid process, however a purchase order and approval by the City Manager or the Director of Administrative Services is required for these purchases.

The Department Head may also elect to perform the project using employees of the City by force account.

#### 2.1 Contract and Purchase Order

- a) If applicable, a contract shall be prepared and two original copies shall be signed by the contractor and the Department Head.
- b) A purchase order shall also be prepared detailing the contractor/service provider name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the contractor/service provider.
- d) The entire purchase order, the W-9 and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and should include a copy of the informal bid summary. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. and one original copy of the executed contract shall then be forwarded to the originating Department.

#### 2.2 Executing the Contract

Once the Department has received the approved Purchase Order and an original copy of the contract from the City Manager or the Director of Administrative Services, they may make arrangements with the contractor for services.

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<sup>1</sup> This limit is tied to Public Contract Code Section 22032. Any changes to limits set in Public Contract Code Section hereby are adopted as part of this policy.

## SECTION VI- PUBLIC PROJECTS

### **2.0 CITY MANAGER AWARD LEVEL I \$30,000.01 to \$45,000<sup>1</sup> (continued)**

#### 2.3 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a less than \$45,000 annual contract amount. Change orders may not exceed the \$45,000 contract amount.

### **3.0 CITY MANAGER AWARD LEVEL II \$45,000.01<sup>1</sup> to \$175,000.00<sup>1</sup>**

Public Projects contracts over \$45,000.00<sup>1</sup> and under \$175,000.01<sup>1</sup> may be let to contract by the informal bid process set forth in this policy.

#### 3.1 Informal Bids:

The City shall solicit informal bids in accordance with Public Contract Code Sections 22034-22036. (See Appendix A)

#### 3.2 Contract and Purchase Order

- a) A contract shall be prepared and two original copies shall be signed by the contractor and Department Head.
- b) A purchase order shall also be prepared detailing the contractor/service provider name, address, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the contractor/service provider.
- d) The entire purchase order, the W-9 and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval. He/she will review the contract and purchase order package for conformity to the purchasing policy, for compliance with other established procedures and for availability of funds. The City Manager or the Director of Administrative Services shall then approve and sign the purchase order. The original P.O. and one original copy of the executed contract shall then be forwarded to the originating Department.

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<sup>1</sup> This limit is tied to Public Contract Code Section 22032. Any changes to limits set in Public Contract Code Section hereby are adopted as part of this policy.

## SECTION VI– PUBLIC PROJECTS

### **3.0 CITY MANAGER AWARD LEVEL II \$45,000.01<sup>1</sup> to \$175,000.00<sup>1</sup>** **(continued)**

#### 3.3 Executing the Contract

Once the Department has received the approved Purchase Order and an original copy of the contract from the City Manager or the Director of Administrative Services, they may make arrangements with the contractor for services.

#### 3.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a less than a 25% aggregate change in the contract price, not to exceed the \$175,000 contract limit. Change orders in excess of the 25% aggregate or the \$175,000 contract limit shall be brought to the City Council for approval.

### **4.0 CITY COUNCIL AWARD > \$175,000.00<sup>1</sup>**

Public Projects exceeding \$175,000<sup>1</sup> must be formally bid and awarded by the City Council in accordance with Public Contract Code Sections 22037 to 22044.

#### 4.1 Formal Bidding

The City shall solicit formal bids in accordance with Public Contract Code Sections 22037-22044. (See Appendix A)

The initiating Department shall be responsible for completion of the formal bid process, however the process shall be coordinated with the City Clerk's Office and the Administrative Services Department.

- a) Bid Forms: The initiating department shall prepare a bid form including detail specifications for the services to be purchased. The following format is suggested for competitive bids:
  1. Submission of bids (or proposals) – Include date, time, location and bid number as assigned by the City Clerk. Include a detail list of the information the bid or proposal should contain
  2. Questions – List the name, address, and telephone number of the person to be contacted concerning questions about the project.

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<sup>1</sup> This limit is tied to Public Contract Code Section 22032. Any changes to limits set in Public Contract Code Section hereby are adopted as part of this policy.

## SECTION VI- PUBLIC PROJECTS

### **4.0 CITY COUNCIL AWARD > \$175,000.00<sup>1</sup> (continued)**

#### 4.1 Formal Bidding (continued)

##### a) Bid Forms: (continued)

3. Background - Provide as much background as necessary to give the bidder an understanding of the environment in which the job will be performed and to which the job relates.
4. Scope of work – Describe in detail the requirement for the job and detail specification.
5. Desired project schedule – Be as specific as possible.
6. Minimum and desirable qualifications – Be as specific as possible.
7. Performance Bond- Whether a performance bond is required and if so, the amount and form of bidders security.
8. Sample Contract- A sample of the contract that is expected to be used should be included in the bid package.

##### b) Notice Inviting Bids: The initiating department shall also prepare a notice inviting bids that includes the following:

1. A general description of the services to be purchased.
2. A statement indicating where bid forms, specifications and bonding requirements can be obtained.
3. A statement specifying the time and place for the opening of the bids.
4. The notice shall be published at least fourteen calendar days before the date of the opening of bids in a newspaper of general circulation, printed and published in the City. (It is recommended that it be published twice, not less than five days apart.)
5. The notice shall also be mailed to all construction trade journals specified in Section 22036 of the Public Contract Code. The notices shall be mailed at least thirty (30) calendar days before the date of opening the bids.

##### c) Bid Opening

1. Sealed bids shall be submitted to the City Clerk's office and shall be clearly identified with the Bid number on the envelope. Faxed or other electronic bids are not acceptable.
2. Bids shall be opened in public at the time and place stated in the public notice.
3. The City Clerk or his/her designee shall open the bids and shall record all bids received.

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## SECTION VI- PUBLIC PROJECTS

### **4.0 CITY COUNCIL AWARD > \$175,000.00<sup>1</sup> (continued)**

#### 4.1 Formal Bidding (continued)

##### c) Bid Opening (continued)

4. Any bid received after the time specified in the notice shall be rejected.
5. When a bidder's security is required, it will be announced in the public notice inviting bids. The amount shall be determined at the time of preparation of the bid. It shall be in the form of cash, certified or cashier's check, certificate of deposit in the City of Atascadero's name or bid bond made payable to the City of Atascadero. When a bidder's security is required, a bid shall not be considered unless one of the aforementioned forms of security accompanies the bid. Bidders shall be entitled to return of the bid security with the following exception:

- The successful bidder must execute the contract and file acceptable documents within thirty (30) calendar days from the date of award unless extended by the City Manager. Failure to execute the contract shall be just cause for annulment of the award and forfeiture of the bidder's security, not as a penalty, but as liquidated damages. The City Council may, upon refusal or failure of the successful bidder to execute the contract, award the contract to the next lowest bidder.

6. All bids received shall be available for inspection during regular business hours in the City Clerk's office for a period of not less than thirty (30) calendar days after the bid opening.
- d) Rejection of Bids: The City reserves the right to reject any and all bids, to accept or reject any one or more items of a bid, or to waive any irregularities or informalities in the bids or the bidding process if to do so is deemed to best serve the interests of the City. If after the first invitation of bids all bids are rejected, the City may elect to re-advertise for bids or have the project done by force account. (See Section 22038 of the Public Contract Code for Procedures and limitations)
- e) Determining Lowest Responsible Bidder: Award of bid shall be to the lowest responsible bidder who has submitted a responsive bid. All valid responsive bids shall be considered in determining the lowest bid. Before the award, the bidder may be required to furnish evidence of capability, equipment and financial resources to adequately perform the work. Bidders not found to be qualified may have their bid rejected.

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## SECTION VI- PUBLIC PROJECTS

### **4.0 CITY COUNCIL AWARD > \$175,000.00<sup>1</sup> (continued)**

#### 4.1 Formal Bidding (continued)

- f) Tie Bids: If tie bids are received, quality and service being equal, the contract shall be awarded to a local bidder.

If the above condition is not applicable, the City may, at its discretion:

1. Reject any and all bids presented and re-advertise; or
2. City may accept either one or accept the lowest bid made by negotiation with the tie bidders; or
3. Award the bid to any one of the low tie bidders by public drawing.

#### 4.2 Awarding the Bid

Once the bids have been evaluated, the Department Head shall prepare a report to Council recommending the lowest responsive bid by a responsible bidder. The Council shall then award the bid in a public meeting.

All public project contracts exceeding \$175,000.00<sup>1</sup> must be awarded by the City Council. Otherwise:

1. Such purchases are void and not considered an obligation of the City.
2. Invoices may be returned to the contractor/service provider unpaid.
3. The person ordering the unauthorized purchase may be held personally liable for the costs of the contract.

#### 4.3 Contract and Purchase Order

- a) A contract shall be prepared and two original copies shall be signed by the contractor.
- b) A purchase order shall also be prepared detailing the contractor name, service being purchased, estimated total price of the service being purchased and budget account to be charged. The purchase order shall be signed and dated by the Department Head.
- c) The Department will obtain a completed IRS form W-9 from the contractor/service provider.
- d) Proof of insurance in accordance with the contract shall be obtained
- e) Performance and payment bonds shall be obtained. (Bonds must be in a form accepted by the City and must meet all City requirements.)

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## SECTION VI- PUBLIC PROJECTS

### **4.0 CITY COUNCIL AWARD > \$175,000.00<sup>1</sup> (continued)**

#### 4.3 Contract and Purchase Order (continued)

- f) The City Attorney shall sign the two original copies of the contract approving it as to form.
- g) The City Manager or his/her Council designee shall sign the two original copies.
- h) The entire purchase order, the W-9, proof of insurance, copies of the bonds, and both original copies of the contract shall be submitted to the City Manager or the Director of Administrative Services for approval and signature and should include a copy of the Staff Report.
- i) One original copy of the executed contract shall be returned to the contractor and the other original shall remain in the City Clerk's Office. A copy of the executed contract shall be sent to the initiating department and a copy to the Administrative Services Department.

#### 4.4 Change Orders

The City Manager is authorized to issue change orders for changes or additions to the original scope of work that result in less than a 25% aggregate change in contract price. Change orders in excess of 25% shall be brought to the City Council for approval.

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## SECTION VII

### TRAVEL AND EXPENSE REIMBURSEMENTS

#### PURPOSE AND SCOPE

The City of Atascadero's ("City") travel policy prescribes procedures for Officials and Employees to report and be reimbursed for official travel and business expenses. The following guidelines and procedures are set forth to minimize costs, improve accountability and ease management review of reimbursement claims.

This policy applies to elected and appointed Officials of the City and all Employees of the City. Department Heads may adopt more restrictive policies due to budget limitations or requirements of other government agencies. Compensation to Employees for travel time shall be consistent with the requirements of the Fair Labor Standards Act.

This policy assumes a mutual trust between the City and its Officials and Employees. The City shall reimburse Officials and Employees for all reasonable costs incurred on behalf of the City. Officials and Employees are expected to use good judgment in spending public funds which have been entrusted to them. Misuse or misappropriation of City funds and equipment not in conformance with this policy may result in disciplinary action, which for Employees may include termination of employment.

#### DEFINITIONS

**OFFICIAL:** When used in Section VII, an Official shall refer to any individual elected to a City office (e.g., a City Council member, Mayor, or City Treasurer) or any individual appointed to an office by the City Council (e.g., a member of the Planning Commission). For purposes of Section VII, an Official is never considered to be an Employee.

**EMPLOYEE:** When used in Section VII, an Employee shall refer to anyone who volunteers on behalf of the City or anyone who holds a paid position with the City. For purposes of Section VII, an independent contractor shall not be considered an Employee.

#### POLICIES

##### 1.0 GENERAL PROVISIONS

- 1.1 Travel shall be authorized only when necessary and in the best interest of the City. The City shall reimburse actual, reasonable and necessary expenses incurred while on City business, not to exceed established guidelines. Expenses incurred in connection with the following types of activities are hereby deemed authorized expenses, as long as the other requirements of this policy are met:
  - a. Communicating with representatives of regional, state and national

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**1.0 GENERAL PROVISIONS (continued)**

government on the City's adopted policy positions; and

- b. Attending educational seminars designed to improve an Official's or Employee's skill and/or knowledge; and
- c. Participating in regional, state and national organizations whose activities affect the City's interests; and
- d. Implementing a City-approved strategy for attracting or retaining businesses to the City, which shall typically involve at least one staff member; and
- e. For any Employee, any other general City business authorized by that Employee's Department Head.

Expenditures for any other type of activity require prior approval by the City Council for Officials and City Manager for Employees.

1.2 The City shall NOT reimburse personal expenses, including but not limited to:

- a. The personal portion of any trip;
- b. Political or charitable contributions or events;
- c. Family expenses, including a partner's expenses when accompanying an Official or Employee on agency-related business, as well as children- or pet-related expenses;
- d. Entertainment expenses, including theater, movies (either in-room or at the theater), sporting events (including gym, massage and/or golf-related expenses), or other cultural events;
- e. Non-mileage personal automobile expenses, including repairs, traffic citations, insurance or gasoline; and
- f. Personal losses incurred while on City business.

1.3 City Officials and Employees should neither enrich themselves nor be required to use their own funds while traveling on City business.

1.4 The City Manager or his/her designee must approve all proposed travel out of the San Luis Obispo/ Santa Barbara County area for City Employees. References in this policy to out-of-area travel shall mean travel outside the San Luis Obispo/Santa Barbara County area.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**1.0 GENERAL PROVISIONS (continued)**

- 1.5 Travel and expense funded by the Commission of Peace Officer Standards and Training (POST) shall be subject to restrictions currently in effect from POST. POST shall govern expenditure limitations for meals and lodging, superseding this policy. When preparing reimbursements for POST, a copy of the reimbursement request shall be forwarded to the Administrative Services Department to track the receivable.

**2.0 AUTHORIZATION FOR TRAVEL AT CITY EXPENSE**

2.1 Authorization Levels

- a. Within the San Luis Obispo/Santa Barbara County Area: Employees must obtain department head approval prior to official travel within San Luis Obispo County/Santa Barbara area or same day travel outside the area.
- b. Outside the San Luis Obispo County/Santa Barbara County Area (Within California): Employees must obtain Department Head and City Manager or the Director of Administrative Services approval prior to travel and overnight stay outside the San Luis Obispo/Santa Barbara County area on City business.
- c. Out of State: Employees must obtain the City Manager's prior written approval for any Official out-of-state travel.

2.2 Exceptions

Mutual/Auto Aid travel shall be reported to the City Manager as time permits. Prior approval may not be possible.

2.3 Format for Request

The information to be submitted with all requests for out-of-area travel is as follows:

- a. Requests must be submitted in advance of the actual travel.
- b. Department Head or his/her designee shall confirm by means of their authorization that the appropriate budget is available for the travel.
- c. Total cost of the proposed travel shall be itemized, including all costs for registration fees, lodging, meals, transportation, etc.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**3.0 LODGING**

Lodging expenses consist of charges for out-of-area overnight accommodations as required for conduct of official City business. Lodging expenses shall be reimbursed or paid for when travel on official City business reasonably requires an overnight stay.

**3.1 Stay Reasonably Required**

An overnight stay is reasonably required when the traveler would otherwise have to leave his or her residence before 6:00 a.m. on the day of the event to arrive at the destination at the designated time. Lodging expense is allowable for the evening after an out-of-town meeting or business event when the traveler would otherwise arrive at his/her residence after 9:00 p.m.

**3.2 Lodging Rates**

If possible, Employees and Officials should make hotel/motel reservations well in advance and take other actions to incur the lowest possible lodging expenses (e.g. compare rates, request occupancy tax exemptions, etc.)

- a. **Government Rates** Employees and Officials must request government rates when making reservations or registering at hotels/motels. If possible, Employees and Officials should make hotel/motel reservations well in advance and take other actions to incur the lowest possible lodging expenses (e.g. compare rates, request occupancy tax exemptions). Lodging rates that are equal to or less than government rates are presumed to be reasonable and hence reimbursable for purposes of this policy.
- b. **Group Rates** If such lodging is in connection with a conference, lodging expenses must not exceed the group rate published by the conference sponsor for the meeting in question if such rates are available at the time of booking. If the group rate is not available, see next section.
- c. **Alternatives** In the event that government rates or group rates are not available at a given time or in a given area, there are three options available to Employees and Officials.
  - i. *Option #1 (Median Hotel Cost):* Lodging rates that do not exceed the median retail price for moderate lodging for that area listed on websites like [www.priceline.com](http://www.priceline.com) or an equivalent service shall be considered reasonable and hence reimbursable.
  - ii. *Option #2 (Flat Cap).* Lodging rates that do not exceed one hundred eighty dollars (\$180) per night are presumed reasonable and hence reimbursable.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**3.0 LODGING (continued)**

- iii. *Option #3 (IRS Rates).* Lodging rates that do not exceed the Internal Revenue Service per diem rates for a given area are presumed reasonable and hence reimbursable.

**3.3 Special Lodging**

With prior City Manager approval, the City may reimburse Employees for special lodging accommodations, i.e., other than hotels or motels. Special accommodations include, but are not limited to, apartments, RV parks, and other semi-permanent dwellings.

**3.4 Use of Lodging as a Guest of Friends or Relatives**

Employees and Officials may stay with friends or relatives while on out-of-town business; however, the City shall not reimburse Employees and Officials for payment to friends or relatives for lodging, meals, or transportation.

**3.5 Credit Card Use**

Employees and Officials may charge all lodging costs on City credit cards but must reimburse the City for unauthorized expenses upon return.

**4.0 MEALS**

Allowable meal expenses include food and beverages purchased and consumed while on official City business, provided these items are not covered by other expenses, i.e., conference fees, airline fares, lodging, etc. AB1234 prohibits per diem reimbursements for Officials, therefore the per diem method of reimbursements is for City Employees only.

**4.1 Rate of Reimbursement**

Officials may be reimbursed for eligible meal expenses, while Employees may either receive a per diem or be reimbursed for eligible meal expenses.

- a. Per Diem Method: A per diem of \$51.00 shall be paid to Employees for meals associated with each day of travel as follows:

- 1. Breakfast \$10.00
- 2. Lunch \$15.00
- 3. Dinner \$26.00

- b. Reimbursement Method: Each meal, including gratuity, shall be reimbursed to Official or Employee up to the Domestic Per Diem Rates per US General Services Administration per-meal guideline and must be accounted for separately on a reimbursement claim. Under special

**SECTION VII  
 TRAVEL AND EXPENSE REIMBURSEMENT**

**4.0 MEALS (continued)**

circumstances, the City Manager may approve individual meal expenses (for Employees only) above the guideline with written justification, copies of restaurant bills, and evidence of department head approval. If an individual claims meal expenses for more than one Employee, s/he must list all Employees on the expense reimbursement form.

c. Normally, meals are reimbursable under the following time criteria:

<u>MEAL</u>	<u>TRAVEL BEGINS BEFORE</u>	&	<u>TRAVEL ENDS AFTER</u>
Breakfast	7:00 a.m.		8:00 a.m.
Lunch	11:00 a.m.		1:00 p.m.
Dinner	5:00 p.m.		6:00 p.m.

**4.2 Meals Purchased on Travels That Do Not Include an Overnight Stay**

Normally, the City will NOT reimburse employees for meals purchased within the City of Atascadero or surrounding areas, while they are engaged in day-to-day job duties, or engaged in any one-day travel that does not include an overnight stay. However, Department Heads may authorize reimbursement under the following circumstances:

- Attendance at job-related conferences or meetings held in the City or surrounding regions extending over meal times, and the business of the conferences or meetings is pursued during the meals, or
- In special cases, the City Manager may authorize the purchase of meals for employees while within the City in conjunction with City business as appropriate.
- During emergencies declared by authorized government authorities in which City employees must work for more than two hours beyond the normal duty day.

**4.3 Reimbursement of City Officials or Employees for Costs of Meals Purchased for Non-City Personnel**

The City may reimburse Officials and Employees for purchasing meals for non-City personnel in any of the following circumstances:

- If authorized by the City Manager.
- For oral board members

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**4.0 MEALS (continued)**

- For emergency workers responding to City requests for mutual aid under mutual aid agreements or for emergency workers acting on behalf of the City under emergencies declared by authorized government entities.
- For special cases, the Department Head may authorize as appropriate the purchase of meals for non-city personnel in conjunction with City business or in cases where there is benefit to the City by purchasing such meal.

**5.0 TRANSPORTATION**

Transportation expenses are the direct costs of transporting Employees from authorized points of departure, to travel destinations and authorized points of return. These expenses normally include, but are not limited to, common carrier tickets, private vehicle mileage, and car rental charges.

Other transportation expenses include taxi, bus, and streetcar fares; road, bridge, and ferry tolls; parking fees; and other costs directly related to transporting Employees to and from temporary work locations.

Transportation expenses not covered include: personal travel, traffic and parking violations and emergency repairs on private vehicles.

NOTE: City gas cards and Cal-Cards should not be used for fuel purchases on personal vehicles.

**5.1 Mode of Transportation**

When traveling on City business, Officials and Employees should use the least expensive modes of transportation consistent with time requirements and work schedules. The City shall reimburse travelers for the most cost-effective transportation means, considering both direct costs and Employee time management.

**5.2 Rate of Reimbursement:**

Officials and Employees who do not receive monthly auto allowances shall be reimbursed for travel mileage incident to the authorized use of privately-owned vehicles on City business. Reimbursement shall be at the rate currently prescribed and necessary expenses incident to the use of privately owned vehicles, including insurance, repairs, and other transportation-related costs. The City shall not reimburse individuals for gasoline purchases when they claim the per-mile

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**5.0 TRANSPORTATION (continued)**

reimbursement rate for private vehicles. This amount does not include bridge and road tolls which are also reimbursable.

**5.3 Commercial Auto Rental**

The City shall reimburse Officials and Employees for actual and necessary costs of rental when substantiated by invoice. Rental of an automobile should be limited to those situations where it is determined that it the most economical method of transportation or with Department Head approval, in those situations where it would create a hardship for the Employee to use a personal vehicle. The size of an auto rented shall be the least expensive size appropriate to the use required by the Employee. Rental rates that are equal or less than those available through the State of California's website ([www.catravelmart.com/default.htm](http://www.catravelmart.com/default.htm)) shall be considered the most economical and reasonable for the purpose of reimbursement under this policy. If possible, travelers should refuel rental vehicles before returning them to rental agencies. Employees may use City credit cards to pay for rental vehicles.

**5.4 Air Travel.**

When an Employee claims commercial airline expenses, the cost shall be limited to the least expensive class available, unless prior approval of City Manager for upgrade. Travelers shall attempt to use the lowest airline rates available. Airfares that are equal or less than those available through the Enhanced Local Government Airfare Program offered through the League of California Cities ([www.cacities.org/travel](http://www.cacities.org/travel)), the California State Association of Counties ([www.csac.counties.org/default.asp?id=635](http://www.csac.counties.org/default.asp?id=635)) and the State of California are presumed to be the most economical and reasonable for purposes of reimbursement under this policy. Reservations should be made as far in advance as possible to take advantage of available discounts. Frequent flier mileage and bonus points or premiums, such as discounts on future fares, received, as a result of travel on Official City business shall accrue to the City.

**5.5 Taxi-Style and Other Local Transportation.**

The City shall reimburse the cost of taxi-style fare including a fifteen percent (15%) gratuity per fare to and from places of business, hotels, airports, or railroad stations in connection with official activities and meals. Taxi-style transportation is permitted only when suitable and more economical services are not reasonably available. Whenever available, Employees must attempt to use complimentary hotel/motel shuttle services.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**6.0 BUSINESS EXPENSES**

Business expenses are those incidental to official travel other than transportation, lodging, and meals. Receipts shall be required for all business expenses, except as provided in paragraph 7.3.

6.1 General

The City shall reimburse Employees for business expenses, provided they do not include the costs of discretionary items intended for personal benefit or pleasure, such as entertainment, or barber and beauty shop charges. Business expenses normally include, but are not limited to, the following:

- Conference registration fees (if not paid by separate claims)
- Officials and Employees shall be reimbursed for actual telephone and fax expenses incurred doing City business. Telephone bills should identify which calls were made doing City business. For cellular telephone calls when the Official or Employee has a particular number of minutes included in his or her plan, the Official or Employee can identify the percentage of calls made doing public business. Employees shall be reimbursed for one personal telephone call per day. All other personal telephone calls are the Employee's responsibility. More calls per day may be authorized by the Department Head in special circumstances.
- Reasonable amounts paid to baggage handlers, porters, and other service personnel.

**7.0 REIMBURSEMENT CLAIMS**

7.1 General

- a. Officials and Employees must submit expense claims upon return. Officials and Employees should submit approved travel claims (along with supporting vouchers and receipts) within six weeks after completion of travel. All claims must have travelers' signatures and, for Employees, Department or Division Head approval.
- b. Receipts documenting each expense must be submitted with the appropriate paperwork to accounts payable. Inability to provide documentation in a timely fashion may result in the expense being borne by the Official or the Employee.
- c. There shall be no settlement of claims totaling less than \$1.00.
- d. All expenses are subject to verification that they comply with this policy.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**7.0 REIMBURSEMENT CLAIMS (continued)**

7.2 Claim Forms

Claim forms shall include:

- Consistent with this Policy, the City business involved.
- Dates of travel.
- Travelers' names.
- Travel destinations.
- Expense identification, i.e., seminars, meals, plane fare, etc.
- Dollar amounts of all expenses.
- Personal expenses only if part of City credit card charges. These must be subsequently subtracted from claim totals.
- Additional explanations as needed to substantiate claims.

**8.0 REGISTRATION / EXPENSE ADVANCES**

8.1 Minimum

City Employees may request advances for reimbursable travel expenses. The minimum advance shall be \$50. City Officials may not receive cash advances from the City. If advances exceed actual expenses, Employees must remit the difference when they file their claims. If a trip is canceled, the advance must be remitted within one week of the cancellation.

8.2 Reservation and Registration

Official and Employees may use City credit cards for reservations and registration. If a reservation shall result in an actual charge to the City, the traveler must request a receipt and submit a claim.

**9.0 REPORTS TO GOVERNING BOARDS**

At the City Council meeting following the conference or other business for which any reimbursable expenses were incurred by an Official, each Official shall briefly report on meetings or other business attended at the City's expense. If multiple Officials attend, a joint report may be made.

**SECTION VII  
TRAVEL AND EXPENSE REIMBURSEMENT**

**10.0 RESPONSIBILITY AND ACCOUNTABILITY**

10.1 Administration

Each Department Head shall be held responsible and accountable for the administration of this policy within his/her department. Department heads should consult with the Director of Administrative Services and/or City Manager on questions related to this policy. The City Manager shall annually review the practices and reports of the various departments in regard to the administration of this policy.

Each City Official shall be held responsible and accountable for the administration of this policy for his/her own travel. City Officials should consult with the Director of Administrative Services and/or City Manager on questions related to this policy.

10.2 Compliance with Laws

Officials and Employees should keep in mind that some expenditures may be subject to reporting under the Political Reform Act and other laws. All agency expenditures are public records subject to disclosure under the Public Records Act and other laws.

10.3 Violation of This Policy

- a. Loss of reimbursement privileges;
- b. A demand for restitution to the City;
- c. The agency's reporting the expenses as income to the elected Official to state and federal tax authorities;
- d. Civil penalties of up to one thousand dollars (\$1,000) per day and three times the value of the resources used; and
- e. Prosecution for misuse of public resources.

**11.0 AUDITS OF EXPENSE REPORTS**

All expenses are subject to verification for compliance with this Policy.

## **Section VIII** **PETTY CASH**

### **PURPOSE**

To provide guidelines for the purchase of minor items using petty cash. Petty cash purchases are not designed to circumvent normal purchasing procedures, but are designed to expedite the acquisition of emergency needs and less significant items.

### **POLICIES**

#### **1.0 PURCHASES**

- 1.1 Petty cash may be used for purchases up to \$50.00. Any petty cash purchases over \$50.00 shall be approved by the Director of Administrative Services in advance.
- 1.2 A Petty Cash Slip shall be completed and a receipt attached for all petty cash purchases. The Petty Cash Slip must be approved by the appropriate Department/Division manager. It should include the account to be charged and a brief description of the item to be purchased.
- 1.3 An employee may request a petty cash advance for purchases up to \$50.00 or the estimated amount, whichever is less. Prior to receiving the cash, the employee must submit an approved Petty Cash Slip. After the purchase, the receipt and remaining funds shall be returned to the petty cash box, and the Petty Cash Slip shall be adjusted to reflect actual expenditures.

#### **2.0 PETTY CASH BOXES**

- 2.1 The Director of Administrative Services is responsible for assigning petty cash boxes.
- 2.2 Proceeds from the petty cash box are for City purposes only. Petty cash is not to be used for cashing personal checks or to be loaned out for personal uses.
- 2.3 Any department with a petty cash box is responsible for reconciling cash to receipts regularly. Any irregularities shall be reported promptly to the Administrative Services Department.

## **Section IX** **DISPOSAL OF ASSETS**

### **PURPOSE**

Provide for the proper transfer, disposition, and accountability of surplus and obsolete City property (other than land and buildings).

### **POLICY**

It is necessary to provide for the disposal of surplus and obsolete material or equipment.

#### **1.0 MINOR PROPERTY- ORIGINAL COST < \$500.01**

The Department/Division manager may authorize the disposal of surplus supplies, equipment, or tools with an original value of less than \$500.01 and an estimated current value of less than \$25.00. The Department/Division manager is given considerable discretion in disposing of this property.

#### **2.0 OTHER PROPERTY- ORIGINAL COST > \$500.00**

When an item with an original cost > \$500.00 is no longer needed, becomes worn out, or becomes obsolete, the Department/Division head will submit an Idle Equipment form to the Director of Administrative Services for authorization.

Once the Director of Administrative Services has given the authority to dispose of the assets, the items may be sold through surplus or other auctions, exchanged or transferred to another City function, traded in for new supplies and/or equipment, or disposed of in another reasonable manner. The Director of Administrative Services is also authorized to dispose of said property for the highest scrap value or cause its destruction or other disposition.

This policy will not apply to real property or unclaimed property held by the Police Department.

**Section X**  
**RECOVERED ORGANIC WASTE**  
**PRODUCT PROCUREMENT**

**PURPOSE**

It is the policy of the City, applicable to all departments and divisions, to incorporate environmental considerations including recycled-content and recovered Organic Waste product use into purchasing practices and procurement. This Recovered Organic Waste Product Procurement Policy (Policy) will help the City to:

1. Protect and conserve natural resources, water, and energy;
2. Minimize the City's contribution to climate change, pollution, and solid waste disposal; and,
3. Comply with State requirements as contained in 14 CCR Division 7, Chapter 12, Article 12 (SB 1383 procurement regulations) to procure a specified amount of Recovered Organic Waste Products to support Organic Waste disposal reduction targets and markets for products made from recycled and recovered Organic Waste materials, and to purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper.

**DEFINITIONS**

- A. “Annual Recovered Organic Waste Product Procurement Target” means the amount of Organic Waste in the form of a Recovered Organic Waste Product that the City is required to procure annually under 14 CCR Section 18993.1. This target shall be calculated by multiplying the per capita procurement target, which shall be 0.08 tons of Organic Waste per California resident per year, times the City's residential population using the most recent annual data reported by the California Department of Finance. Annually, CalRecycle will provide notice to each City of its Annual Recovered Organic Waste Product Procurement Target by posting such information on CalRecycle’s website and providing written notice directly to the Jurisdiction.
- B. “City” means the City of Atascadero, a municipal corporation acting through its City Council, and all the territory lying within the municipal boundaries of the City.
- C. “Compost” means the product resulting from the controlled biological decomposition of organic solid wastes that are source separated from the municipal solid waste stream or which are separated at a centralized facility or as otherwise defined in 14 CCR Section 17896.2(a)(4).

Compost eligible for meeting the Annual Recovered Organic Waste Product Procurement Target must be produced at a compostable material handling operation or facility permitted or authorized under 14 CCR Chapter 3.1 of Division 7 or produced at a large volume in-vessel digestion facility that composts on-site as defined and

- permitted under 14 CCR Chapter 3.2 of Division 7. Compost shall meet the State’s composting operations regulatory requirements.
- D. “Direct Service Provider” means a person, company, agency, district, or other entity that provides a service or services to City pursuant to a contract or other written agreement or as otherwise defined in 14 CCR Section 18982(a)(17).
- E. “Electricity Procured from Biomass Conversion” means electricity generated from biomass facilities that convert recovered Organic Waste, such as wood and prunings from the municipal stream, into electricity. Electricity procured from a biomass conversion facility may only count toward the City’s Annual Recovered Organic Waste Product Procurement Target if the facility receives feedstock directly from certain permitted or authorized compostable material handling operations or facilities, transfer/processing operations or facilities, or landfills, as described in 14 CCR Section 18993.1(i).
- F. “Organic Waste” means solid wastes containing material originated from living organisms and their metabolic waste products including, but not limited to, food, yard trimmings, organic textiles and carpets, lumber, wood, Paper Products, Printing And Writing Paper, manure, biosolids, digestate, and sludges, or as otherwise defined in 14 CCR Section 18982(a)(46). Biosolids and digestate are as defined in 14 CCR Section 18982(a)(4) and 14 CCR Section 18982(a)(16.5), respectively.
- G. “Paper Products” include, but are not limited to, paper janitorial supplies, cartons, wrapping, packaging, file folders, hanging files, corrugated boxes, tissue, and toweling; or as otherwise defined in 14 CCR Section 18982(a)(51).
- H. “Printing and Writing Papers” include, but are not limited to, copy, xerographic, watermark, cotton fiber, offset, forms, computer printout paper, white wove envelopes, manila envelopes, book paper, note pads, writing tablets, newsprint, and other uncoated writing papers, posters, index cards, calendars, brochures, reports, magazines, and publications; or as otherwise defined in 14 CCR Section 18982(a)(54).
- I. “Procurement of Recovered Organic Waste Products” shall mean purchase or acquisition (e.g., free delivery or free distribution from a hauler or other entity via a written agreement or contract), and end use by the City or others. The City’s Annual Recovered Organic Waste Product Procurement Target can be fulfilled directly by the City or by Direct Service Providers through written contracts or agreements for Procurement of Recovered Organic Waste Products at the City’s behest.
- J. “Publicly-Owned Treatment Works” or “POTW” has the same meaning as in Section 403.3(r) of Title 40 of the Code of Federal Regulations. For the purposes of this Policy, the POTW shall be the Water Reclamation Facility, 8005 Gabarda Road, Atascadero, California 93422.
- K. “Recovered Organic Waste Products” means products made from California, landfill-diverted recovered Organic Waste processed at a permitted or otherwise authorized operation or facility, or as otherwise defined in 14 CCR Section 18982(a)(60). Products

- that can be used to meet the Annual Recovered Organic Waste Product Procurement Target shall include Compost, SB 1383 Eligible Mulch, Renewable Gas from an in-vessel digestion facility, and Electricity Procured from Biomass Conversion as described herein and provided that such products meet requirements of 14 CCR, Division 7, Chapter 12, Article 12.
- L. “Recordkeeping Designee” means the City Department or public employee appointed by the City Manager or their designee to track procurement and maintain records of Recovered Organic Waste Product procurement efforts both by the City and others, if applicable, as required by 14 CCR, Division 7, Chapter 12, Articles 12 and 13. The Recordkeeping Designee will report such records to the Reporting Designee.
- M. “Reporting Designee” means an entity that the City contracts with or otherwise arranges to carry out any of the City’s reporting responsibilities of this policy as authorized in 14 CCR.
- N. “Recyclability” means that the Paper Products and Printing and Writing Paper offered or sold to the City are eligible to be labeled with an unqualified recyclable label as defined in 16 Code of Federal Regulations Section 260.12 (2013).
- O. “Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper” means such products that consist of at least thirty percent (30%), by fiber weight, postconsumer fiber, consistent with the requirements of Sections 22150 to 22154 and Sections 12200 and 12209 of the Public Contract Code, and as amended.
- P. “Renewable Gas” means gas derived from Organic Waste that has been diverted from a landfill and processed at an in-vessel digestion facility that is permitted or otherwise authorized by 14 CCR to recover Organic Waste, or as otherwise defined in 14 CCR Section 18982(a)(62).
- Q. “SB 1383” means Senate Bill 1383 of 2016 approved by the Governor on September 19, 2016, which added Sections 39730.5, 39730.6, 39730.7, and 39730.8 to the Health and Safety Code, and added Chapter 13.1 (commencing with Section 42652) to Part 3 of Division 30 of the Public Resources Code, establishing methane emissions reduction targets in a statewide effort to reduce emissions of short-lived climate pollutants, as amended, supplemented, superseded, and replaced from time to time.
- R. “SB 1383 Regulations” or “SB 1383 Regulatory” means or refers to, for the purposes of this policy, the Short-Lived Climate Pollutants (SLCP): Organic Waste Reductions regulations developed by CalRecycle and adopted in 2020 that created Chapter 12 of 14 CCR, Division 7 and amended portions of regulations of 14 CCR and 27 CCR.
- S. “SB 1383 Eligible Mulch” means mulch eligible to meet the Annual Recovered Organic Waste Product Procurement Target, pursuant to 14 CCR Chapter 12 of Division 7. This SB 1383 Eligible Mulch shall meet the following conditions for the duration of the applicable procurement compliance year, as specified by 14 CCR Section 18993.1(f)(4):

1. Produced at one of the following facilities:
  - i. A compostable material handling operation or facility as defined in 14 CCR Section 17852(a)(12), that is permitted or authorized under 14 CCR Division 7, other than a chipping and grinding operation or facility as defined in 14 CCR Section 17852(a)(10);
  - ii. A transfer/processing facility or transfer/processing operation as defined in 14 CCR Sections 17402(a)(30) and (31), respectively, that is permitted or authorized under 14 CCR Division 7; or,
  - iii. A solid waste landfill as defined in Public Resources Code Section 40195.1 that is permitted under 27 CCR Division 2.
2. Meet or exceed the physical contamination, maximum metal concentration, and pathogen density standards for land application specified in 14 CCR Sections 17852(a)(24.5)(A)1 through 3.

T. “State” means the State of California.

## **POLICIES**

### **1.0 RECOVERED ORGANIC WASTE PRODUCT PROCUREMENT**

#### **1.1 Procurement Target**

- A. City will annually procure for use or giveaway a quantity of Recovered Organic Waste Products that meets or exceeds its Annual Recovered Organic Waste Product Procurement Target through the implementation of Sections 1.0 through 3.0 of this Policy.
- B. To be eligible to meet the Annual Recovered Organic Waste Product Procurement Target, products that may be procured include the following (provided that each product meets the criteria included in their respective definitions in this Policy):
  1. SB 1383 eligible Compost (as defined in Definition Section C).
  2. SB 1383 Eligible Mulch (as defined in Definition Section S).
  3. Renewable Gas (in the form of transportation fuel, electricity, or heat) (as defined in Definition Section P).
  4. Electricity Procured from Biomass Conversion (as defined in Definition Section E).

#### **1.2 Requirements for Direct Service Providers**

- A. Direct Service Providers of landscaping maintenance, renovation, and construction shall:

1. Use Compost and SB 1383 Eligible Mulch, as practicable, produced from recovered Organic Waste, as defined in Section 2.C and 2.S of this Policy, for all landscaping renovations, construction, or maintenance performed for the City, whenever available, and capable of meeting quality standards and criteria specified. SB 1383 Eligible Mulch used for land application shall comply with 14 CCR, Division 7, Chapter 12, Article 12 and must meet or exceed the physical contamination, maximum metal concentration and pathogen density standards specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).
  
2. If Direct Service Provider is subject to the City's Water Efficient Landscape Ordinance (WELO) pursuant to Atascadero Municipal Code Title 8, Chapter 10, the Direct Service Provider should comply with one of the following, whichever is more stringent: (i) the City's WELO if more stringent than the State's Model Water Efficient Landscape Ordinance (MWELO), or (ii) Sections 492.6 (a)(3)(B), (C), (D), and (G) of the State's MWELO, Title 23, Division 2, Chapter 2.7 of the CCR, as amended September 15, 2015, which requires the submittal of a landscape design plan with a "Soil Preparation, Mulch, and Amendments Section" to include the following:
  - a. For landscape installations, Compost at a rate of a minimum of 4 cubic yards per 1,000 square feet of permeable area shall be incorporated to a depth of six (6) inches into the soil. Soils with greater than six percent (6%) organic matter in the top six (6) inches of soil are exempt from adding Compost and tilling.
  
  - b. Apply a minimum three- (3-) inch layer of mulch on all exposed soil surfaces of planting areas except in turf areas, creeping or rooting groundcovers, or direct seeding applications where mulch is contraindicated. To provide habitat for beneficial insects and other wildlife, leave up to five percent (5%) of the landscape area without mulch. Designated insect habitat must be included in the landscape design plan as such.
  
  - c. Procure organic mulch materials made from recycled or post-consumer materials rather than inorganic materials or virgin forest products unless the recycled post-consumer organic products are not locally available. Organic mulches are not required where prohibited by local Fuel Modification Plan Guidelines or other applicable local ordinances.
  
  - d. For all mulch that is land applied, procure SB 1383 Eligible Mulch that meets or exceeds the physical contamination, maximum metal concentration, and pathogen density standards for land applications specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).

3. Keep and provide records of Procurement of Recovered Organic Waste Products (either through purchase or acquisition) to Recordkeeping Designee, upon completion of projects. Information to be provided shall include:
  - a. General description of how and where the product was used and if applicable, applied;
  - b. Source of product, including name, physical location, and contact information for each entity, operation, or facility from whom the Recovered Organic Waste Products were procured;
  - c. Type of product;
  - d. Quantity of each product; and,
  - e. Invoice or other record demonstrating purchase or procurement.

B. Direct Service Provider of Organic Waste collection services shall:

1. Provide a specified quantity of Compost or SB 1383 Eligible Mulch to City and its customers via periodic “giveaways” as specified in a franchise agreement or other agreement.
2. Keep and provide records to the City including the following:
  - a. Dates provided;
  - b. Source of product including name, physical location and contact information for each entity, operation or facility from whom the Recovered Organic Waste Products were procured;
  - c. Type of product;
  - d. Quantity provided; and,
  - e. Invoice or other record or documentation demonstrating purchase, procurement, or transfer of material to giveaway location.

C. Renewable Gas procurement by Direct Service Providers

1. Direct Service Providers transporting solid waste, organic materials, and/or recyclable materials shall procure their fuel as Renewable Gas as required to do so in RFPs and RFQs released by the City for such services or as required by permit, license, written agreement, or written contract with the City.
2. Departments releasing RFPs and RFQs for contractors that procure fuel in the course of their services to the City shall include a preference to

contractors that propose to use the amount or percentage of Renewable Gas specified in the RFP or RFQ to be eligible for said price preference. Such use, if it occurs, shall be documented in a written contract or agreement.

3. If Renewable Gas made from recovered Organic Waste is used by Direct Service Providers, Direct Service Providers shall submit information listed in Section 1.2.B.2.a-e on a schedule to be determined by City, but not less than annually to the Recordkeeping Designee.
4. Renewable Gas used by Direct Service Providers under Sections 1.2.A and 1.2.B shall comply with criteria specified in 14 CCR Section 18993.1.

### 1.3 Requirements for City Departments

A. Compost and SB 1383 Eligible Mulch procurement. Divisions and departments responsible for landscaping maintenance, renovation, or construction shall:

1. Use Compost and SB 1383 Eligible Mulch produced from recovered Organic Waste, as defined in Definition Section C and S of this Policy, for landscaping maintenance, renovation, or construction, as practicable, whenever available, and capable of meeting quality standards and criteria specified. SB 1383 Eligible Mulch used for land application must meet or exceed the physical contamination, maximum metal concentration and pathogen density standards specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).
2. When City uses Compost and SB 1383 Eligible Mulch and the applications are subject to the City's WELO, pursuant to Atascadero Municipal Code Title 8, Chapter 10, the City will comply with one of the following, whichever is more stringent, (i) the City's WELO, if more stringent than the State's MWELo, or (ii) Sections 492.6 (a)(3)(B), (C), (D), and (G) of the State's Model Water Efficient Landscape Ordinance, Title 23, Division 2, Chapter 2.7 of the CCR, as amended September 15, 2015, which requires the submittal of a landscape design plan with a "Soil Preparation, Mulch, and Amendments Section" to include the following:
  - a. For landscape installations, Compost at a rate of a minimum of 4 cubic yards per 1,000 square feet of permeable area shall be incorporated to a depth of six (6) inches into the soil. Soils with greater than six percent (6%) organic matter in the top six (6) inches of soil are exempt from adding Compost and tilling.
  - b. Apply a minimum three- (3-) inch layer of mulch on all exposed soil surfaces of planting areas except in turf areas, creeping or rooting groundcovers, or direct seeding applications where mulch is contraindicated. To provide habitat for beneficial insects and other wildlife, leave up to five percent (5%) of the landscape area without

mulch. Designated insect habitat must be included in the landscape design plan as such.

c. Procure organic mulch materials made from recycled or post-consumer materials rather than inorganic materials or virgin forest products unless the recycled post-consumer organic products are not locally available. Organic mulches are not required where prohibited by local Fuel Modification Plan Guidelines or other applicable local ordinances.

d. For all mulch that is land applied, procure SB 1383 Eligible Mulch that meets or exceeds the physical contamination, maximum metal concentration, and pathogen density standards for land applications specified in 14 CCR Section 17852(a)(24.5)(A)(1) through (3).

3. Keep records, including invoices or proof of Recovered Organic Waste Product procurement (either through purchase or acquisition), and submit records to the Recordkeeping Designee, upon completion of project.

Records shall include:

a. General procurement records, including:

(i) General description of how and where the product was used and applied, if applicable;

(ii) Source of product, including name, physical location, and contact information for each entity, operation, or facility from whom the Recovered Organic Waste Products were procured;

(iii) Type of product;

(iv) Quantity of each product; and,

(v) Invoice or other record demonstrating purchase or procurement.

b. For Compost and SB 1383 Eligible Mulch provided to residents through giveaway events or other types of distribution methods, keep records of the Compost and SB 1383 Eligible Mulch provided to residents. Records shall be maintained and submitted to the Recordkeeping Designee in accordance with the requirements specified in Section 1.3.A.3.

c. For procurement of SB 1383 Eligible Mulch, maintain an updated copy of the ordinance or enforceable mechanism(s) requiring that the mulch procured by the City or Direct Service Provider meets the

land application standards specified in 14 CCR Section 18993.1, as it may be amended from time to time.

4. When Procurement of Recovered Organic Waste Products occurs through a Direct Service Provider, enter into a written contract, franchise agreement, or other agreement or execute a purchase order with enforceable provisions that includes: (i) definitions and specifications for SB 1383 Eligible Mulch, Compost, Renewable Gas, and/or Electricity Procured from Biomass Conversion; and, (ii) an enforcement mechanism (e.g., termination, liquidated damages) in the event the Direct Service Provider is not compliant with the requirements.

B. Renewable Gas procurement (used for fuel for transportation, electricity, or heating applications). For Renewable Gas procurement, City shall:

1. Procure Renewable Gas made from recovered Organic Waste for transportation fuel, electricity, and heating applications to the degree that it is appropriate and available for the City and to help meet the Annual Recovered Organic Waste Product Procurement Target, which requires compliance with criteria specified in 14 CCR Section 18993.1.
2. Keep records in the same manner indicated in Section 1.3.A.3 for the amount of Renewable Gas procured and used by the Jurisdiction, including the general procurement record information specified in Section 1.3.A.3.a, and submit records to the Recordkeeping Designee on a schedule prescribed by the Recordkeeping Designee. City shall additionally obtain the documentation and submit records specified in Section 1.3.B.3 below, if applicable.
3. If the City procures Renewable Gas from a POTW,
  - a. Annually verify that the Renewable Gas from the POTW complies with the requirements specified in 14 CCR Section 18993.1(h), including, but not limited to the exclusion in 14 CCR Section 17896.6(a)(1) and the items listed in this Section 1.3.B.3.
  - b. Annually receive a record from the POTW documenting the tons of Organic Waste received by the POTW from: (i) a compostable material handling operation or facility as defined in 14 CCR Section 17852(a)(12), other than a chipping and grinding operation or facility as defined in 14 CCR Section 17852(a)(10), that is permitted or authorized under 14 CCR Division 7; (ii) transfer/processing facility or transfer/processing operation as defined in 14 CCR Sections 17402(a)(30) and (31), respectively, that is permitted or authorized under 14 CCR Division 7; or (iii) a solid waste landfill as defined in Public Resources Code Section 40195.1 that is permitted under 27 CCR Division 2.

- c. Annually receive documentation from the POTW of the percentage of biosolids that the POTW produced and transported to activities that constitute landfill disposal in order to demonstrate that the POTW transported less than twenty-five percent (25%) of the biosolids it produced to activities that constitute landfill disposal. For the purposes of this Policy, landfill disposal is defined pursuant to 14 CCR Section 18983.1(a) and includes final disposition at a landfill; use of material as alternative daily cover or alternative intermediate cover at a landfill, and other dispositions not listed in 14 CCR Section 18983.1(b). Alternative daily cover or alternative intermediate cover are defined in 27 CCR Sections 20690 and 20700, respectively.
- d. Annually receive documentation that the POTW receives vehicle-transported solid waste that is an anaerobically digestible material for the purpose of anaerobic co-digestion with POTW treatment plant wastewater to demonstrate that the POTW meets the requirement of 14 CCR Section 18993.1(h)(2).
- e. City shall submit these records to the Recordkeeping Designee and Reporting Designee on a schedule to be determined by the Reporting Designee.

C. Electricity Procured from Biomass Conversion. For Electricity Procured from Biomass Conversion, City shall:

- 1. Procure electricity from a biomass conversion facility that receives feedstock from a composting facility, transfer/processing facility, a solid waste landfill, and/or receives feedstock from the generator (or employees on behalf of the generator) of the Organic Waste and to the degree that it is available and practicable for the City and to help meet the Annual Recovered Organic Waste Product Procurement Target, which requires compliance with criteria specified in 14 CCR Section 18993.1.
- 2. Maintain records and conduct the following recordkeeping activities:
  - a. Keep records in the same manner indicated in Section 1.3.A.3 of this Policy for the amount of Electricity Procured from Biomass Conversion facilities, including the general procurement record information specified in Section 1.3.A.3.a.
  - b. Receive written notification by an authorized representative of the biomass conversion facility certifying that biomass feedstock was received from a permitted solid waste facility identified in 14 CCR Section 18993.1(i).
  - c. Provide these records to the Recordkeeping Designee.

## 2.0 RECYCLED-CONTENT PAPER PROCUREMENT

### 2.1 REQUIREMENTS FOR CITY DEPARTMENTS

- A. Comparable or more favorable pricing: If fitness and quality of Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper are equal to that of non-recycled items, all departments and divisions of City shall purchase Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, whenever available at the same or a lesser total cost than non-recycled items, consistent with the requirements of the Public Contracts Code, Sections 22150 through 22154 and Sections 12200 and 12209, as amended.
- B. All Paper Products and Printing and Writing Paper shall be eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available from vendor.
- C. Provide records to the Recordkeeping Designee of all Paper Products and Printing and Writing Paper purchases within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by a division or department or employee of the City. Records shall include a copy of the invoice or other documentation of purchase, written certifications as required in Section 2.2.A.3-4 for recycled-content purchases if available, vendor name, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non-Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.

### 2.2 REQUIREMENTS FOR CONTRACTED VENDORS

- A. All contracted vendors that provide Paper Products (including janitorial Paper Products) and Printing and Writing Paper to City shall:
1. Provide Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, if fitness and quality are equal to that of non-recycled item, and if they are available at an equal or lesser price.
  2. Only provide Paper Products and Printing and Writing Papers that meet Federal Trade Commission Recyclability standard as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available.
  3. Certify in writing, under penalty of perjury, the minimum percentage of postconsumer material in the Paper Products and Printing and Writing Paper offered or sold to the Jurisdiction. This certification requirement may be waived if the percentage of postconsumer material in the Paper Products, Printing and Writing Paper, or both can be verified by a product label, catalog, invoice, or a manufacturer or vendor internet website.

4. Certify in writing, under penalty of perjury, that the Paper Products and Printing and Writing Paper offered or sold to the City is eligible to be labeled with an unqualified recyclable label as defined in Title 16 Code of Federal Regulations Section 260.12 (2013), when available.
  5. Provide records to the purchasing department, as requested, of all Paper Products and Printing and Writing Paper purchased from the vendor within thirty (30) days of the purchase (both recycled-content and non-recycled content, if any is purchased) made by a division or department or employee of the City. Records shall include a copy of the invoice or other documentation of purchase, written certifications as required in Section 2.2.A.3-4 for recycled-content purchases, purchaser name, quantity purchased, date purchased, and recycled content (including products that contain none), and if non-Recycled-Content Paper Products and/or non- Recycled-Content Printing and Writing Paper are provided, include a description of why Recycled-Content Paper Products and/or Recycled-Content Printing and Writing Paper were not provided.
- B. All vendors providing printing services to the City via a printing contract or written agreement, shall make best efforts to use Printing and Writing Paper that consists of at least thirty percent (30%), by fiber weight, postconsumer fiber, or as amended by Public Contract Code Section 12209.

### **3.0 RECORDKEEPING RESPONSIBILITIES**

- A. A department or public employee, as determined by the City Manager, will be the responsible department or person to act as the Recordkeeping Designee that will be responsible for obtaining records pertaining to Procurement of Recovered Organic Waste Products and Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper, as well as reporting such records to the Reporting Designee.
- B. The Recordkeeping Designee and/or Reporting Designee will do the following to track Procurement of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper:
1. Collect and collate copies of invoices or receipts (paper or electronic) or other proof of purchase that describe the procurement of Printing and Writing Paper and Paper Products, including the volume and type of all paper purchases; and, copies of certifications and other required verifications from all departments and/or divisions procuring Paper Products and Printing and Writing Paper (whether or not they contain recycled content) and/or from the vendors providing Printing and Writing Paper and Paper Products. These records must be kept as part of City's documentation of its compliance with 14 CCR Section 18993.3.
  2. Collect and collate copies of invoices or receipts or documentation evidencing procurement from all departments and divisions procuring Recovered Organic Waste Products and invoices or similar records from vendors/contractors/others procuring Recovered Organic Waste Products on behalf of the City to develop evidence of City meeting its Annual Recovered Organic Waste Product

Procurement Target. These records must be kept as part of the City's documentation of its compliance with 14 CCR Section 18993.1.

3. Collect, collate, and maintain documentation submitted by the City, Direct Service Providers, and/or vendors, including the information reported to the Recordkeeping Designee in accordance with Sections 1.2.A.3, 1.2.B.2, 1.2.C.2, 1.3.A.3, 1.3.B.2, 1.3.C.3, 2.1.C, and 2.2.A.5.
4. Compile an annual report on the City's direct procurement, and vendor/other procurement on behalf of the City, of Recovered Organic Waste Products, Recycled-Content Paper Products, and Recycled-Content Printing and Writing Paper, consistent with the recordkeeping requirements contained in 14 CCR Section 18993.2 for the Annual Recovered Organic Waste Product Procurement Target and 14 CCR Section 18993.4 for Recycled-Content Paper Products and Recycled-Content Printing and Writing Paper procurement. This report shall be made available to the City's responsible entity for compiling the annual report to be submitted to CalRecycle (which will include a description of compliance on many other SB 1383 regulatory requirements) pursuant to 14 CCR Division 7, Chapter 12, Article 13.

# Appendix A

Appendix A  
Public Contract Code

**PCC §22030**

- (a) This article applies only to a public agency whose governing board has by resolution elected to become subject to the uniform construction cost accounting procedures set forth in Article 2 (commencing with Section 22010) and which has notified the Controller of that election. In the event of a conflict with any other provision of law relative to bidding procedures, this article shall apply to any public agency which has adopted a resolution and so notified the Controller.
- (b) A county, whether general law or charter, containing a population of less than 500,000 may award individual annual contracts as provided in Section 20128.5.

**PCC §22031**

- (a) Prior to January 1, 2013, this article shall not prohibit a board of supervisors or a county road commissioner from utilizing, as an alternative to the procedures set forth in this article, the procedures set forth in Article 25 (commencing with Section 20390) of Chapter 1.
- (b) On or after January 1, 2013, this article shall not prohibit a board of supervisors or a county road commissioner from utilizing, as an alternative to the procedures set forth in this article, the procedures set forth in Article 25 (commencing with Section 20390) of Chapter 1 for both of the following;
  - (1) Maintenance and emergency work.
  - (2) New road construction and road reconstruction as long as the total value of the new road construction and the road reconstruction performed under the procedures set forth in subdivision © of Section 20395 during a fiscal year does not exceed 30 percent of the total value of all worked performed by force account other than maintenance as reported in the Controller's Streets and Roads Annual Report as of March 1 of each year prior to the fiscal year.
- (c) The value of force account work necessary to facilitate capital projects for the purpose of contacting to the private sector, including design, engineering, inspection, testing, and other force account work necessary to administer private contracts, shall be excluded from the 30-percent limit in subdivision (b).
- (d) The value of force account work necessary to facilitate projects performed by county employees, including design, engineering, inspection, testing, and other force account work necessary to administer work performed under subdivision (b), shall apply to the 30-percent limit in subdivision (b).
- (e) On or after January 1, 2013, for a county with a population of less than 50,000, this article shall not prohibit a board of supervisors or a county road commissioner from utilizing, as an alternative to the procedures set forth in this article, the procedures set forth in Article 25 (commencing with Section 20390) of Chapter 1.
- (f) The requirements set forth in Section 22038 shall apply to any county subject to this section.
- (g) Any county board of supervisors or county road commissioner acting pursuant to the authority granted in paragraph (2) of subdivision (b) shall publicly declare its

## Appendix A Public Contract Code

### **PCC §22031 (continued)**

intention to use this authority prior to commencing work. The public declaration may be on a project-by-project basis, via a list of anticipated projects for the fiscal year, or via list that may be included in the county's annual budget.

### **PCC §22032**

(a) Public projects of forty-five thousand dollars (\$45,000) or less may be performed by the employees of a public agency by force account, by negotiated contract, or by purchase order.

(b) Public projects of one hundred seventy-five thousand dollars (\$175,000) or less may be let to contract by informal procedures as set forth in this article.

(c) Public projects of more than one hundred seventy-five thousand dollars (\$175,000) shall, except as otherwise provided in this article, be let to contract by formal bidding procedure.

### **PCC §22033**

It shall be unlawful to split or separate into smaller work orders or projects any project for the purpose of evading the provisions of this article requiring work to be done by contract after competitive bidding.

### **PCC §22034**

Each public agency that elects to become subject to the uniform construction accounting procedures set forth in Article 2 (commencing with Section 22010) shall enact an informal bidding ordinance to govern the selection of contractors to perform public projects pursuant to subdivision (b) of Section 22032. The ordinance shall include all of the following:

(a) Notice to contractors shall be provided in accordance with either paragraph (1) or (2), or both.

(1) The public agency shall maintain a list of qualified contractors, identified according to categories of work. Minimum criteria for development and maintenance of the contractors list shall be determined by the commission. All contractors on the list for the category of work being bid shall be mailed, faxed, or emailed a notice inviting informal bids unless the product or service is proprietary. All mailing of notices to contractors pursuant to this subdivision shall be completed not less than 10 calendar days before bids are due.

(2) The public agency may elect to mail, fax, or email a notice inviting informal bids to all construction trade journals specific in Section 22036.

(b) The notice inviting informal bids shall describe the project in general terms and how to obtain more detailed information about the project, and state the time and place for the submission of bids.

(c) The governing body of the public agency may delegate the authority to award informal contracts to the public works director, general manager, purchasing agent, or other appropriate person.

## Appendix A Public Contract Code

### **PCC §22034 (continued)**

(d) If all bids received are in excess of one hundred seventy-five thousand dollars (\$175,000), the governing body of the public agency may, by adoption of a resolution by a four-fifths vote, award the contract, at one hundred eighty-seven thousand five hundred dollars (\$187,500) or less, to the lowest responsible bidder, if it determines the cost estimate of the public agency was reasonable.

### **PCC §22035**

(a) In cases of emergency when repair or replacements are necessary, the governing body may proceed at once to replace or repair any public facility without adopting plans, specifications, strain sheets, or working details, or giving notice for bids to let contracts. The work may be done by day labor under the direction of the governing body, by contractor, or by a combination of the two.

(b) In case of an emergency, if notice for bids to let contracts will not be given, the public agency shall comply with Chapter 2.5 (commencing with Section 22050).

### **PCC §22035.5**

In counties that are under court order to relieve justice facility overcrowding, the procedures and restrictions specified in Section 20134 shall apply to all contracts issued under this chapter.

### **PCC §22036**

The commission shall determine, on a county-by-county basis, the appropriate construction trade journals which shall receive mailed, faxed, or emailed notice of all informal and formal construction contracts being bid for work within the specified county.

### **PCC §22037**

Notice inviting formal bids shall state the time and place for the receiving and opening of sealed bids and distinctly describe the project. The notice shall be published at least 14 calendar days before the date of opening the bids in a newspaper of general circulation, printed and published in the jurisdiction of the public agency; or, if there is no newspaper printed and published within the jurisdiction of the public agency, in a newspaper of general circulation which is circulated within the jurisdiction of the public agency, or, if there is no newspaper which is circulated within the jurisdiction of the public agency, publication shall be by posting the notice in at least three places within the jurisdiction of the public agency as have been designated by ordinance or regulation of the public agency as places for the posting of its notices. The notice inviting formal bids shall also be sent electronically, if available, by either facsimile or electronic mail and mailed to all construction trade journals specified in Section 22036. The notice shall be sent at least

## Appendix A Public Contract Code

### **PCC §22037(continued)**

15 calendar days before the date of opening the bids. In addition to notice required by this section, the public agency may give such other notice as it deems proper.

### **PCC §22038**

(a) In its discretion, the public agency may reject any bids presented, if the agency, prior to rejecting all bids and declaring that the project can be more economically performed by employees of the agency, furnishes a written notice to an apparent low bidder. The notice shall inform the bidder of the agency's intention to reject the bid and shall be mailed at least two business days prior to the hearing at which the agency intends to reject the bid. If after the first invitation of bids all bids are rejected, after reevaluating its cost estimates of the project, the public agency shall have the option of either of the following:

(1) Abandoning the project or readvertising for bids in the manner described by this article.

(2) By passage of a resolution by a four-fifths vote of its governing body declaring that the project can be performed more economically by the employees of the public agency, may have the project done by force account without further complying with this article.

(b) If a contract is awarded, it shall be awarded to the lowest responsible bidder. If two or more bids are the same and the lowest, the public agency may accept the one it chooses.

(c) If no bids are received through the formal or informal procedure, the project may be performed by the employees of the public agency by force account, or negotiated contract without further complying with this article.

### **PCC §22039**

The governing body of the participating public agency or its designated representative shall adopt plans, specifications, and working details for all public projects exceeding the amount specified in subdivision (c) of Section 22032.

### **PCC §22040**

Any person may examine the plans, specifications, or working details, or all of these, adopted by the public agency for any project.

### **PCC §22041**

This article does not apply to the construction of any public building used for facilities of juvenile forestry camps or juvenile homes, ranches, or camps established under Article 15 (commencing with Section 880) of Chapter 2 of Part 1 of Division 2 of the Welfare and Institutions Code, if a major portion of the construction work is to be performed by wards of the juvenile court assigned to those camps, ranches, or homes.

## Appendix A Public Contract Code

### **PCC §22042**

The commission shall review the accounting procedures of any participating public agency where an interested party presents evidence that the work undertaken by the public agency falls within any of the following categories:

- (a) Is to be performed by a public agency after rejection of all bids, claiming work can be done less expensively by the public agency.
- (b) Exceeded the force account limits.
- (c) Has been improperly classified as maintenance.

### **PCC §22042.5**

The commission shall review practices of any participating public agency where an interested party presents evidence that the public agency is not in compliance with Section 22034.

### **PCC §22043**

- (a) In those circumstances as set forth in subdivision (a) of Section 22042, a request for commission review shall be in writing, sent by certified or registered mail received by the commission postmarked not later than eight business days from the date the public agency has rejected all bids.
- (b) In those circumstances set forth in subdivision (b) or (c) of Section 22042, a request for commission review shall be by letter received by the commission not later than eight days from the date an interested party formally complains to the public agency.
- (c) The commission review shall commence immediately and conclude within the following number of days from the receipt of the request for commission review:
  - (1) Forty-five days for a review that falls within subdivision (a) of Section 22042.
  - (2) Ninety days for a review that falls within subdivision (b) or (c) of Section 22042.
- (d) During the review of a project that falls within subdivision (a) of Section 22042, the agency shall not proceed on the project until a final decision is received by the commission.
- (e) A request for commission review pursuant to Section 22042.5 shall be in writing, sent by certified or registered mail, and received by the commission no later than eight days from the day an interested party formally complains to the public agency. The commission review shall commence immediately and conclude within 90 days from the receipt of the request for commission review.

### **PCC §22044**

The commission shall prepare written findings, which shall be presented to the public agency within 30 calendar days of formal commission review. Should the commission find that the provisions of this chapter or of the uniform cost accounting procedures

## Appendix A Public Contract Code

### **PCC §22044 (continued)**

provided for in this chapter were not complied with by the public agency, the following steps shall be implemented by that agency:

(a) On those projects set forth in subdivision (a) of Section 22042, the public agency has the option of either:

- (1) abandoning the project, or
- (2) awarding the project to the lowest responsible bidder.

(b) On those projects set forth in subdivision (b) or (c) of Section 22042, the public agency shall present the commission's findings to its governing body within 30 calendar days of receipt of written notice of the findings and that governing body shall conduct a public hearing with regard to the commission's findings within 60 calendar days of receipt of the findings.

(c) (1) On findings of noncompliance pursuant to Section 22042.5, the public agency shall notify its governing body of the commission's findings within 60 calendar days of receipt of written notice of the findings from the commission.

(2) The public agency shall notify the commission in writing, within 90 days of receipt of written notice of the findings, of the public agency's best efforts to comply.

### **PCC §22044.5**

If the commission makes a finding, in accordance with Section 22043, on three separate occasions within a 10-year period, that the work undertaken by a public agency falls within any of the categories described in Section 22042, the commission shall notify the public agency of that finding in writing by certified mail and the public agency shall not use the bidding procedures provided by this article for five years from the date of the commission's findings.

### **PCC §22045**

(a) No later than January 1, 1985, the commission shall recommend, for adoption by the Controller, written procedures implementing the accounting procedures review provided for in this article.

(b) The Controller shall, upon receipt of the commission's recommendation, review and evaluate the recommended procedures and either formally adopt or reject the recommended procedures within 90 days of submission of the commission.



# ***Atascadero City Council***

## ***Staff Report – Community Development Department***

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### **General Plan & Housing Element Annual Progress Report 2021 (CPP 22-0031)**

#### **RECOMMENDATION:**

Council review and accept the Annual General Plan and Housing Element Progress Reports for 2021.

#### **DISCUSSION:**

##### Background

The State of California requires cities to file an Annual General Plan Progress Report to the Office of Planning and Research (OPR) and a Housing Element Annual Progress Report (APR) to the Department of Housing and Community Development (HCD). The purpose of this report is to monitor the City's implementation of the City's General Plan policies, particularly policy implementation that involves the production of housing. A copy of the Annual General Plan and Housing Element Progress reports are attached for reference.

##### Analysis

The primary purpose of the annual progress report is to monitor the implementation of the City's General Plan Housing Element and progress toward meeting the City's Regional Housing Needs Allocation (RHNA). These regional housing allocations are required to be used by the City when updating the Housing Element. They are the basis for assuring that adequate sites are zoned and available to accommodate the minimum the number of units allocated to our City. These housing allocation numbers are not housing unit quotas that the City must achieve, but instead are housing targets that the City must plan for through targeted zoning, site identification, and reduction of obstacles to development. State Housing Element law requires that each City and County identify and analyze existing and projected housing needs within their jurisdictions, and prepare goals, policies, programs and quantified objectives to further the development, improvement, and preservation of housing.

The San Luis Obispo Council of Governments (SLOCOG) provides each City in our County with a specific allocation of additional housing units that must be accommodated in each jurisdiction's land use plan. SLOCOG has completed the Regional Housing Needs Allocation (RHNA) and 843 total units have been allocated to the City of Atascadero for this RHNA cycle (2020-2028). Attachment 1 includes the relevant tables and data the City will be submitting to HCD. Note that the APR report format is catered to

larger jurisdictions and Atascadero does not have relevant data, such as housing element rezoning or commercial density bonus implementation, to fill out all of the tables in the report therefore, only relevant tabs are included in the attachment. The full submittal is available for review by contacting the Planning Department.

One substantial new component for this RHNA cycle is that the City is able to include Accessory Dwelling Units (ADUs) towards our RHNA allocation. However, we do not require deed restrictions on ADU's to ensure long term affordability. Instead, we assume the affordability is built-in due to the design of an ADU and the fact that it shares a property with a primary residence.

In 2021, the City issued permits to construct 136 new residential units. These include 3 deed-restricted very low-income apartment units (10850 ECR), 1 deed-restricted low-income unit, 1 deed restricted moderate unit (Grand Oaks), 12 new ADUs that qualify as low income units, and 53 new ADUs that qualify as moderate affordable units. The remainder of the units (66) are considered above moderate, or "market rate" units.

ADUs are included in our RHNA based on a regional rent study completed by SLO County in 2020. The study allows local jurisdictions to count 50% of ADU's as low income and the other 50% as moderate income. 12 of the issued moderate-income units and 8 of the completed moderate-income units are accessory dwelling units allowed per the regional rental study. The remaining are considered affordable by design, but the State may require proof of rent levels and these units may need to be reallocated as above-moderate income (market rate) units for RHNA progress reporting.

	Ext/Very Low	Low	Mod	Mkt rate	TOTAL
2020		5	4	36	45
2021	3	13	54*	66	136
<b>RHNA</b>	<b>204</b>	<b>131</b>	<b>151</b>	<b>354</b>	<b>843</b>
<b>Remaining Balance</b>	<b>201</b>	<b>113</b>	<b>93*</b>	<b>252*</b>	<b>662</b>

\*39 units may be reallocated to Market Rate if affordable-by-design units cannot be counted

Based on the City's recently adopted Housing Element land inventory, there is sufficient land to continue to meet the 6<sup>th</sup> Cycle RHNA allocation. Newly adopted State laws require that cities now monitor development of all sites identified to meet RHNA goals and take proactive action to rezone properties as needed should those identified sites not develop at full density or provide the number of affordable units anticipated by the Housing Element.

**FISCAL IMPACT:**

None.

**ATTACHMENTS:**

1. 2021 HCD Annual Progress Report
2. 2021 Annual General Plan Progress Report

**Please Start Here**

General Information	
Jurisdiction Name	Atascadero
Reporting Calendar Year	2021
Contact Information	
First Name	Kelly
Last Name	Gleason
Title	Senior Planner
Email	kgleason@atascadero.org
Phone	8054703446
Mailing Address	
Street Address	6500 Palma Ave
City	Atascadero
Zipcode	93422

**Optional:** Click here to import last year's data. This is best used when the workbook is new and empty. You will be prompted to pick an old workbook to import from. Project and program data will be copied exactly how it was entered in last year's form and must be updated. If a project is no longer has any reportable activity, you may delete the project by selecting a cell in the row and typing ctrl + d.

v 1\_13\_2022

Jurisdiction	Atascadero	
Reporting Year	2021	(Jan. 1 - Dec. 31)
Planning Period	6th Cycle	12/31/2020 - 12/31/2028

**ANNUAL ELEMENT PROGRESS REPORT**  
**Housing Element Implementation**

Note: "+" indicates an optional field  
 Cells in grey contain auto-calculation formulas

(CCR Title 25 §6202)

**Table A**  
**Housing Development Applications Submitted**

Project Identifier					Unit Types		Date Application Submitted	Proposed Units - Affordability by Household Incomes							Total Approved Units by Project	Total Disapproved Units by Project	Streamlining	Density Bonus Applications		Application Status	Notes		
1					2	3	4	5							6	7	8	9	10		11	12	
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4,5+,ADU,MH)	Tenure R=Renter O=Owner	Date Application Submitted+ (see instructions)	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Total PROPOSED Units by Project	Total APPROVED Units by project	Total DISAPPROVED Units by Project	Was APPLICATION SUBMITTED Pursuant to GC 65913.4(b)? (SB 35 Streamlining)	Was a Density Bonus requested for this housing development?	Was a Density Bonus approved for this housing development?	Please indicate the status of the application.	Notes*	
Summary Row: Start Data Entry Below								3	0	136	1	8	62	0	210	210	0						
	030-271-019	5880 ARDILLA RD	AMENDMENT TO ADD 3AMND21-0054		5+	R	5/14/2021			32					32	32		No	Yes	Yes	Approved	State DB for concessions, n	
	030-461-012	10205 EL CAMINO	AMENDMENT TO ADD FAMND21-0058		5+	R	6/9/2021			25					25	25		No	Yes	Yes	Approved	State DB for concessions, n	
	030-461-044	10165 EL CAMINO	NEW 76 UNIT BUILDING DEV21-0045		5+	R	5/6/2021			76					76	76		No	Yes	Yes	Approved	Bonus units and concession	
	049-131-044	6030 DEL RIO RD	Barrel Creek Developmei DEV21-0066		SFD	O	6/18/2021					5	20		25	25		No	No	N/A	Approved		
	049-131-045	6031 DEL RIO RD	Barrel Creek Developmei DEV21-0066		5+	R	6/18/2021	2		3		3	32		40	40		No	No	N/A	Approved		
	049-151-029	2505 EL CAMINO F NEW	11 UNIT RMF - EMPRE21-0080		5+	R	8/11/2021	1					10		11	11		No	Yes	Yes	Approved		
	029-253-003	5690 TRAFFIC WA	NEW UNIT IN RMF/ COLPRE21-0093		ADU	R	9/21/2021				1				1	1		No	No	N/A	Approved		
															0								

Jurisdiction	Atascadero	
Reporting Year	2021	(Jan. 1 - Dec. 31)
Planning Period	6th Cycle	12/31/2020 - 12/31/2028

**ANNUAL ELEMENT PROGRESS REPORT**  
**Housing Element Implementation**  
 (CCR Title 25 §6202)

Note: "\*" indicates an optional field  
 Cells in grey contain auto-calculation formulas

Table A2 Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units																								
Project Identifier					Unit Types		Affordability by Household Incomes - Completed Entitlement							Affordability by Household Incomes - Building Permits										
1					2	3	4							5	6	7							8	9
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4.5+,ADU,MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Entitlement Date Approved	# of Units issued Entitlements	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits
Summary Row: Start Data Entry Below							1	0	133	0	0	10	4		148	3	0	1	12	1	53	66		136
030-271-019		5880 ARDILLA RD	AMENDMENT TO ADD 32 NEW RESIDENTIAL UNITS	AMND21-0054	5+	R			32					7/20/2021	32									0
030-461-012		10205 EL CAMINO I	AMENDMENT TO ADD RESIDENTIAL BUILDING TO M/	AMND21-0058	5+	R			25					9/7/2021	25									0
050-291-011		6255 LLANO RD	Subdivision of 1 parcel into 4 parcels at 6255 Llano	SBDV20-0025	SFD	O						4		10/5/2021	4									0
030-461-044		10165 EL CAMINO I	NEW 76 UNIT BUILDING / TWO LOT TENTATIVE PARC	DEV21-0045	5+	R			76					11/16/2021	76									0
049-151-029		2505 EL CAMINO R	NEW 11 UNIT RMF - EMERALD COURT	PRE21-0080	5+	R	1				10			12/20/2021	11									0
031-243-025		8393 AMAPOA AVE	NEW CONDO COMPLEX: BUILDING B UNIT 5&6 (EACH)	B17-15062	2 to 4	O									0					1		3/1/2021	1	
029-322-012		5802 TRAFFIC WA	3 STORY: COMMERCIAL (1); APARTMENTS (10)	1AFFC BMU20-1360	5+	R									0		1			9		5/24/2021	10	
050-122-017		9175 BALBOA RD	R-3 2754 SF; PORCH 1520; R-WALL	BRES18-0473	SFD	O									0						1	5/10/2021	1	
029-352-002		7165 VALLE AVE	R3 2041SF; U 540 SF; RA 265 SF	BRES19-0450	SFD	O									0						1	10/20/2021	1	
049-102-020		1794 S MIRASOL W	LOT 1 PLAN TYPE A: (R-3) 2,475SF; (U) 574 SF; (RA) 5	BRES19-0629	SFD	O									0						1	4/1/2021	1	
049-102-020		1793 S MIRASOL W	LOT 6 PLAN TYPE A: (R-3) 2,475SF; (U) 574 SF; (RA) 5	BRES19-0630	SFD	O									0						1	4/1/2021	1	
049-102-032		1796 S MIRASOL W	LOT 2 PLAN TYPE B: (R-3) 2,475SF; (U) 574 SF; (RA) 9	BRES19-0631	SFD	O									0						1	4/1/2021	1	
049-102-032		1797 S MIRASOL W	LOT 4 PLAN TYPE B: (R-3) 2,475SF; (U) 574 SF; (RA) 9	BRES19-0632	SFD	O									0						1	4/1/2021	1	
049-102-032		1798 S MIRASOL W	LOT 3 PLAN TYPE C: (R-3) 2,380SF; (U) 614 SF; (RA) 3	BRES19-0634	SFD	O									0						1	4/1/2021	1	
049-102-032		1795 S MIRASOL W	LOT 5 PLAN TYPE C: (R-3) 2,380SF; (U) 614 SF; (RA) 3	BRES19-0635	SFD	O									0						1	4/1/2021	1	
049-191-043		6200 CONEJO RD	R-3 3594; U 617; PORTICO 120; LOGGIA 665; COURTY	BRES19-1164	SFD	O									0						1	1/6/2021	1	
056-181-039		8585 ATASCADER	R-3 1974 SF; U 726 SF; 48 SF PORCH	BRES19-1178	SFD	O									0						1	5/21/2021	1	
056-181-040		8595 ATASCADER	R-3 1974 SF; U 726 SF; 48 SF PORCH	BRES19-1180	SFD	O									0						1	5/21/2021	1	
031-231-003		7908 CURBARIL AV	2 STORY 1780 SF; U 482 SF; PORCH/DECK 93 SF - 79	BRES19-1437	SFD	O									0						1	9/21/2021	1	
030-121-003		7298 #4 & #5 SANT	UNIT #4 & #5: R-3 1033; U 241; DECK 40; CARPORT 1	BRES19-1504	2 to 4	R									0					2		11/9/2021	2	
029-253-007		5590 TUNITAS AVE	NEW 1532 SF SFR W/ATTACHED 482 SF GARAGE; 17	BRES19-1508	SFD	R									0						1	3/30/2021	1	
029-253-007		5588 TUNITAS AVE	NEW 1532 SF SFR W/ATTACHED 482 SF GARAGE; PC	BRES19-1509	SFD	R									0						1	3/30/2021	1	
029-253-007		5592 TUNITAS AVE	NEW 1532 SF SFR W/ATTACHED 482 SF GARAGE; 17	BRES19-1510	SFD	R									0						1	3/30/2021	1	
030-121-003		7298 #6 & #7 SANT	UNIT #6 & #7: R-3 1139; U 234; DECK 40; CARPORT 2	BRES19-1514	2 to 4	R									0					2		11/9/2021	2	
030-121-003		7298 #2 & #3 SANT	UNIT #3 & #2: R-3 1139; U 234; DECK 40; CARPORT 2	BRES19-1515	2 to 4	R									0					2		11/9/2021	2	
030-121-003		7298 #8 & #9 SANT	UNIT #8 & #9: R-3 1039; U 234; DECK 40; CARPORT 2	BRES19-1516	2 to 4	R									0					2		11/9/2021	2	
030-121-003		7298 #10 SANTA Y	SFR UNIT #10: R-3 959; U 243; CARPORT 200; DECK 4	BRES19-1517	2 to 4	R									0					1		11/9/2021	1	
030-121-003		7298 #1 SANTA YS	UNIT #1: R-3 959; U 243; CARPORT 200; DECK 40	BRES19-1518	2 to 4	R									0					1		11/9/2021	1	
045-351-008		930 KEFFURY LANI	NEW APARTMENTS: 3 STORY; 48 UNITS; 48,223 SF	BRES19-1526	5+	R									0	3					39	6/24/2021	42	
031-062-006		7505 ATASCADER	NEW 1850 SF SFR W/758 SF ATTACHED GARAGE	BRES19-1572	SFD	O									0						1	8/27/2021	1	
031-062-006		7550 TECORIDA A	NEW 1198 SF ADU W/484 SF ATTACHED GARAGE	BRES19-1573	ADU	R									0					1		8/27/2021	1	
055-114-003		12375 PUENTE RO	LOT#83 STOCK PLAN 3.05R	BRES19-1577	SFD	O									0						1	12/20/2021	1	
056-211-038		9025 BOSQUE CT	LOT #2; 2411 R-3; 621 U; 115 PORCH	BRES19-1585	SFD	O									0						1	8/19/2021	1	
056-031-046		8215 COROMAR A	1040 SF MANUFACTURED ADU; 180 SF DECK	BRES20-0285	ADU	R									0			1				3/2/2021	1	
054-011-034		6223 SAN ANSELM	1199 SF ADU;538 SF ATTACHED GARAGE;275 SF CO'	BRES20-0620	ADU	R									0					1		2/11/2021	1	
029-271-001		5912 GRAN PASEO	907 SF NEW SFR; GRAND OAKS LOT 15, PLAN C (RE)	BRES20-0841	SFD	O									0						1	4/1/2021	1	
029-271-001		5914 GRAN PASEO	787 SF NEW SFR; GRAND OAKS LOT 21, PLAN B	BRES20-0842	SFD	O									0						1	4/1/2021	1	

Jurisdiction	Atascadero	
Reporting Year	2021	(Jan. 1 - Dec. 31)
Planning Period	6th Cycle	12/31/2020 - 12/31/2028

**ANNUAL ELEMENT PROGRESS REPORT**  
**Housing Element Implementation**  
 (CCR Title 25 §6202)

Note: "\*" Indicates an optional field  
 Cells in grey contain auto-calculation formulas

ITEM NUMBER:  
 DATE:  
 ATTACHMENT:

C-3  
 03/22/22  
 1

**Table A2**

Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units

Project Identifier					Unit Types		Affordability by Household Incomes - Completed Entitlement							Affordability by Household Incomes - Building Permits										
1					2	3	4							5	6	7							8	9
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA, SFD, 2 to 4, 5+, ADU, MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Entitlement Date Approved	# of Units issued Entitlements	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits
Summary Row: Start Data Entry Below							1	0	133	0	0	10	4		148	3	0	1	12	1	53	66		136
	029-271-001	5916 GRAN PASEO 907 SF NEW SFR; GRAND OAKS LOT 11, PLAN C (REVBRES20-0844			SFD	O									0								1	1
	029-271-001	5924 GRAN PASEO 907 SF NEW SFR; GRAND OAKS LOT 13, PLAN C BRES20-0846			SFD	O									0								1	1
	029-271-001	5926 GRAN PASEO 787 SF NEW SFR; GRAND OAKS LOT 08 PLAN B (REVBRES20-0849			SFD	O									0				1				1	1
	029-271-001	5921 GRAN PASEO 940 SF NEW SFR; GRAND OAKS LOT 17, PLAN D (REVBRES20-0851			SFD	O									0								1	1
	029-271-001	5923 GRAN PASEO 940 SF NEW SFR; GRAND OAKS LOT 18, PLAN D.1 (RBRES20-0852			SFD	O									0								1	1
	029-271-001	5925 GRAN PASEO 940 SF NEW SFR; GRAND OAKS LOT 19, PLAN D.1 (RBRES20-0853			SFD	O									0								1	1
	029-271-001	5927 GRAN PASEO 940 SF NEW SFR; GRAND OAKS LOT 20, PLAN D.1 (RBRES20-0854			SFD	O									0								1	1
	029-271-001	5928 GRAN PASEO 907 SF NEW SFR; GRAND OAKS LOT 09, PLAN C (REVBRES20-0855			SFD	O									0								1	1
	055-041-015	9610 LAUREL RD NEW 2 STORY 2252 SF SFR W/883 SF ATTACHED GARAGE BRES20-0920			SFD	O									0								1	1
	050-341-022	6750 LOMITAS RD NEW SFR; 1860 SF BRES20-1048			SFD	O									0								1	1
	030-141-022	8912 CURBARIL AV 749 SF ADU W/484 SF ATTACHED GARAGE BRES20-1096			ADU	R									0			1					1	1
	054-072-088	6420 PORTOLA RD NEW 1460 SF SFR W/490 SF ATTACHED GARAGE BRES20-1364			SFD	O									0								1	1
	054-072-088	6430 PORTOLA RD NEW 1200 SF ADU W/484 SF ATTACHED GARAGE BRES20-1365			ADU	R									0								1	1
	031-373-003	9565 EL PARQUE ANEW 336 SF ADU BRES20-1370			ADU	R									0				1				1	1
	054-331-013	8300 CASITAS RD NEW 1512 SF SFR W/816 SF ATTACHED GARAGE BRES20-1393			SFD	O									0								1	1
	054-111-051	6255 SAN GABRIEL 1197 SF ADU W/ATTACHED GARAGE BRES21-0037			ADU	R									0								1	1
	030-071-062	8980 JUNIPERO AV SFR 1653 SF W/ATTACHED GARAGE 600 SF BRES21-0062			SFD	O									0								1	1
	031-301-025	8760 AZUCENA AV 1680 SF ATTACHED ADU BRES21-0077			ADU	R									0				1				1	1
	054-041-020	3612 MARICOPA R CONVERT EXISTING 721 SF STRUCTURE INTO ADU BRES21-0088			ADU	R									0								1	1
	029-051-034	5473 SAN JACINTO NEW DETACHED 450 SF ADU BRES21-0119			ADU	R									0				1				1	1
	028-132-024	7232 SYCAMORE R NEW ADU: 612 SF BRES21-0293			ADU	R									0								1	1
	055-161-038	10820 VISTA RD 3928 SF NEW SFR; 906 SF ATTACHED GARAGE; 123 BRES21-0313			SFD	O									0								1	1
	049-071-032	3190 TRAFFIC WAY 1472 SF NEW SFR BRES21-0315			SFD	O									0								1	1
	050-021-047	9094 LA CANADA L 2194 SF RESIDENCE W/562 SF ATTACHED GARAGE BRES21-0353			SFD	O									0								1	1
	030-413-016	8550 EL CORTE R (REPLACEMENT UNIT) SFR R-3 2457 SF BRES21-0361			SFD	O									0								1	1
	056-383-024	10309 CATALPA ST 1608 SF REPLACEMENT MANUFACTURED HOME W/C BRES21-0369			MH	O									0								1	1
	028-021-001	4515 SYCAMORE R CONVERT (E) GARAGE TO ADU; R-3 935; U 357; POR BRES21-0456			ADU	R									0				1				1	1
	049-102-020	1794 S MIRASOL W LOT #1 ADU 660 SF; STKP21-0248 BRES21-0457			ADU	O									0								1	1

**Table A2**

Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units

Project Identifier				Unit Types		Affordability by Household Incomes - Completed Entitlement							Affordability by Household Incomes - Building Permits											
1				2	3	4							5	6	7							8	9	
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4,5+ADU,MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Entitlement Date Approved	# of Units issued Entitlements	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits
Summary Row: Start Data Entry Below							1	0	133	0	0	10	4		148	3	0	1	12	1	53	66		136
	049-102-020	1793 S MIRASOL WLOT#6 ADU 660 SF; STKP21-0248		BRES21-0458	ADU	O									0				1				6/8/2021	1
	049-102-032	1796 S MIRASOL WLOT #2 ADU 660 SF; STKP21-0248		BRES21-0459	ADU	O									0						1		6/15/2021	1
	049-102-032	1797 S MIRASOL WLOT #4 ADU 660 SF; STKP21-0248		BRES21-0460	ADU	O									0				1				6/8/2021	1
	049-102-032	1798 S MIRASOL WLOT #3 ADU 660 SF; STKP21-0248		BRES21-0461	ADU	O									0						1		6/8/2021	1
	049-102-032	1795 S MIRASOL WLOT #5 ADU 660 SF; STKP21-0248		BRES21-0462	ADU	O									0				1				6/8/2021	1
	049-172-001	7907 SANTA CRUZ 600 SF AS BUILT NEW ADU		BRES21-0493	ADU	O									0						1		8/11/2021	1
	029-291-003	5432 FRESNO AVE AS BUILT 720 SF ADU		BRES21-0550	ADU	O									0				1				9/9/2021	1
					SFA	O															1			1
	045-351-008	918 KEFFURY LANILOT #6: TOWNHOUSE PLAN 1 (STKP19-1567)		BRES21-0645	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	916 KEFFURY LANILOT #7: TOWNHOUSE PLAN 1 (STKP19-1567)		BRES21-0647	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	920 KEFFURY LANILOT# 5 TOWNHOUSE PLAN 2 (STKP19-1570)		BRES21-0648	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	914 KEFFURY LANILOT# 8 TOWNHOUSE PLAN 2 (STKP19-1570)		BRES21-0649	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	910 KEFFURY LANILOT# 10 TOWNHOUSE PLAN 2 (STKP19-1570)		BRES21-0650	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	906 KEFFURY LANILOT# 12 TOWNHOUSE PLAN 2 (STKP19-1570)		BRES21-0651	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	912 KEFFURY LANILOT #9 TOWNHOUSE PLAN 3 (STKP19-1569)		BRES21-0652	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	908 KEFFURY LANILOT #11 TOWNHOUSE PLAN 3 (STKP19-1569)		BRES21-0655	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	922 KEFFURY LANILOT #4 TOWNHOUSE PLAN 4 (STKP19-1568)		BRES21-0656	SFA	O									0								8/24/2021	1
					SFA	O															1			1
	045-351-008	904 KEFFURY LANILOT #13 TOWNHOUSE PLAN 4 (STKP19-1568)		BRES21-0658	SFA	O									0								8/24/2021	1

**ANNUAL ELEMENT PROGRESS REPORT**  
**Housing Element Implementation**  
(CCR Title 25 §6202)

Note: "\*" indicates an optional field  
 Cells in grey contain auto-calculation formulas

ITEM NUMBER:  
 DATE:  
 ATTACHMENT:

C-3  
 03/22/22  
 1

**Table A2**

**Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units**

Project Identifier					Unit Types		Affordability by Household Incomes - Completed Entitlement							Affordability by Household Incomes - Building Permits										
1					2	3	4							5	6	7							8	9
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4.5+,ADU,MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Entitlement Date Approved	# of Units issued Entitlements	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits
Summary Row: Start Data Entry Below							1	0	133	0	0	10	4		148	3	0	1	12	1	53	66		136
056-502-009		8365 LOS OSOS RI DEMO EXISTING DETACHED GARAGE & BUILD NEW		BRES21-0797	ADU	O									0						1		12/21/2021	1
049-042-024		4705 SANTA CRUZ NEW 1187 SF ADU W/436 SF ATTACHED GARAGE		BRES21-0974	ADU	R									0				1				11/12/2021	1
049-331-009		6940 BALBOA RD NEW 1187 SF ADU W/484 SF ATTACHED GARAGE		BRES21-0975	ADU	R									0						1		10/26/2021	1
054-092-002		5320 CASCABEL RI 707 SF ADU (MANUFACTURED HOME) W/480 SF CAR		BRES21-1039	ADU	R									0			1					11/5/2021	1
029-252-005		5750 TRAFFIC WAY CONVERSION OF (E) COMMERCIAL TO SINGLE DWEI		BRES21-1321	2 to 4	R									0						1		12/14/2021	1
031-244-008		8111 AMAPOA AVE NEW RESIDENTIAL DUPLEX BUILDING: UNIT A (8111 B14-11832			2 to 4	R									0									0
056-091-049		8120 COROMAR A New 2 STORY SFR's HOUSE 1312 SF; BASEMENT 320 B15-13153			SFD	O									0									0
056-351-062		8435 SAN GABRIEL LEGALIZE AS BUILT SECOND UNIT 629 SF		B17-14470	ADU	R									0									0
031-261-005		8445 SAN FRANCIS RESIDENTIAL: NEW SFR 2 STORY 1917 SF; ATTACHE		B17-15287	SFD	O									0									0
030-332-004		5945 VIOLETA AVE NEW SFR		BRES18-0736	SFD	O									0									0
045-401-003		11900 VIA MARBEL LOT 12 STOCK PLAN 2924		BRES18-0991	SFD	O									0									0
054-142-015		7707 SAN GABRIEL R-3 1199 SF; U 493 SF; PATIO 652 SF		BRES19-0550	ADU	R									0									0
056-051-021		8740 EL CAMINO R LEGALIZE 3 UNIT MULTI FAMILY		BRES19-0652	2 to 4	R									0									0
031-043-030		7150 & 7170 NAVA. 7150 & 7170 NAVAJOA NEW DUPLEX		BRES19-0712	2 to 4	R									0									0
055-181-027		11732 SAN MARCO NEW ADU OVER 3 CAR GARAGE		BRES19-0744	ADU	R									0									0
031-231-019		7854 CURBARIL AV SFR 1356 SF; GARAGE 434 SF; PORCH 144 SF; UNIT		BRES19-0862	SFD	O									0									0
054-051-086		4610 PORTOLA RD SFR 1291 SF; GARAGE 492 SF; PORCH 140 SF		BRES19-0892	SFD	O									0									0
045-441-043		9079 SAN DIEGO R R-3 2699 SF; U 976; PORCH 674		BRES19-0955	SFD	O									0									0
054-043-006		3625 ARDILLA RD NEW SFR; 2100 SF		BRES19-1042	SFD	O									0									0
055-114-006		12601 CENEGAL RI R-3 2486; U 517 SF		BRES19-1055	SFD	O									0									0
029-051-013		5335 SAN JACINTO 525 SF GARAGE CONVERSION TO ADU		BRES19-1242	ADU	R									0									0
031-062-001		7400 TECORIDA A NEW SFR 1604 SF; GARAGE 576 SF; PORCH 196 SF;		BRES19-1313	SFD	O									0									0
031-062-001		7402 TECORIDA A NEW 464 SF ADU/STUDIO		BRES19-1314	ADU	R									0									0
030-292-076		6501 POQUITO CRI NEW SFR; 1845 (R-3; 495 (U); 40 (PORCH)		BRES19-1337	SFD	O									0									0
045-402-013		11905 VIA MILAGR LOT #13 STOCK PLAN A (2831)		BRES19-1339	SFD	O									0									0
055-114-002		12635 CENEGAL RI LOT #82 STOCK PLAN 3.05L		BRES19-1364	SFD	O									0									0
030-413-008		8535 EL DORADO FR-3 1776 SF; U 669 SF; PORCH 1575 SF		BRES19-1378	SFD	O									0									0
045-402-004		9300 VIA CASTILL CLOT #4 STOCK PLAN C (2536)		BRES19-1401	SFD	O									0									0
045-402-003		11920 VIA MILAGR LOT#3 STOCK PLAN A (2831)		BRES19-1403	SFD	O									0									0
045-402-016		9315 VIA CASTILL CLOT #16 PLAN C (2536)		BRES19-1404	SFD	O									0									0
030-413-031		8552 EL CORTE ST 1956 SF SFR W/719 SF ATTACHED GARAGE		BRES19-1533	SFD	O									0									0
030-413-028		5545 SANTA FE RD 1956 SF SFR W/719 SF ATTACHED GARAGE (3 OF 3)		BRES19-1535	SFD	O									0									0
054-334-001		8760 SIERRA VIST NEW SFR; R-3 2461; U 670; PORCH 230 SF		BRES19-1543	SFD	O									0									0
056-211-038		9015 BOSQUE CT NEW SFR WITH ATTACHED GARAGE		BRES19-1545	SFD	O									0									0
054-162-005		8520 GRAVES CRE 1200 SF ADU W/400 SF ATTACHED GARAGE		BRES19-1547	ADU	R									0									0
055-114-001		12655 CENEGAL RI LOT#81 STOCK PLAN 3.02L		BRES19-1578	SFD	O									0									0
055-115-016		12415 PECOS CT LOT#67 STOCK PLAN 3.02R		BRES19-1580	SFD	O									0									0
054-041-011		3624 MARICOPA RI 1200 SF ADU W/483 SF ATTACHED GARAGE & 266 SF		BRES20-0503	ADU	R									0									0
049-183-014		7117 SAN GREGOF CONVERT EXISTING 416 SF BLDG INTO ADU; EXISTI#		BRES20-0505	ADU	R									0									0
031-271-010		8930 CARMELITA A CONVERT EXISTING GARAGE INTO 486 SF JR ADU		BRES20-0523	ADU	R									0									0
030-373-030		7555 SAN ANDRES CONVERT 276 SF & ADD 128 SF FOR NEW ADU (404`		BRES20-0807	ADU	R									0									0
030-141-022		8912 CURBARIL AV 749 SF ADU W/484 SF ATTACHED GARAGE		BRES20-1096	ADU	R									0									0
031-373-003		9565 EL PARQUE # NEW 336 SF ADU		BRES20-1370	ADU	R									0									0
030-071-062		8980 JUNIPERO AV SFR 1653 SF W/ATTACHED GARAGE 600 SF		BRES21-0062	SFD	O									0									0
054-041-020		3612 MARICOPA RI CONVERT EXISTING 721 SF STRUCTURE INTO ADU		BRES21-0088	ADU	R									0									0
056-383-024		10309 CATALPA ST 1608 SF REPLACEMENT MANUFACTURED HOME W/		BRES21-0369	MH	O									0									0
049-172-001		7907 SANTA CRUZ 600 SF AS BUILT NEW ADU		BRES21-0493	ADU	R									0									0
029-291-003		5432 FRESNO AVE AS BUILT 720 SF ADU		BRES21-0550	ADU	R									0									0



Affordability by Household Incomes - Certificates of Occupancy							Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions	Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Density Bonus							
10							11	12	13	14	15	16	17	18	19	20			21	22	23	24
Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) Date Issued	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (may select multiple - see instructions)	Deed Restriction Type (may select multiple - see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units	Demolished or Destroyed Units	Demolished/Destroyed Units Owner or Renter	Total Density Bonus Applied to the Project (Percentage Increase in Total Allowable Units or Total Maximum Allowable Residential Gross Floor Area)	Number of Other Incentives, Concessions, Waivers, or Other Modifications Given to the Project (Excluding Parking Waivers or Parking Reductions)	List the incentives, concessions, waivers, and modifications (Excluding Parking Waivers or Parking Modifications)	Did the project receive a reduction or waiver of parking standards? (Y/N)
0	0	0	8	0	15	24		47	0	0				Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.	55				0.0%		Development Standards Modification	Yes
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	N			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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Affordability by Household Incomes - Certificates of Occupancy								Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions	Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Density Bonus						
10							11	12	13	14	15	16	17	18	19	20			21	22	23	24
Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) <u>Date Issued</u>	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (may select multiple - see instructions)	Deed Restriction Type (may select multiple - see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units	Demolished or Destroyed Units	Demolished/Destroyed Units Owner or Renter	Total Density Bonus Applied to the Project (Percentage Increase in Total Allowable Units or Total Maximum Allowable Residential Gross Floor Area)	Number of Other Incentives, Concessions, Waivers, or Other Modifications Given to the Project (Excluding Parking Waivers or Parking Reductions)	List the incentives, concessions, waivers, and modifications (Excluding Parking Waivers or Parking Modifications)	Did the project receive a reduction or waiver of parking standards? (Y/N)
0	0	0	8	0	15	24		47	0	0				This is a small lot mobile home development known for moderate and low income sales prices.		4	0	0				
								0		N	Y				1	Demolished	O					
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
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								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW								

Affordability by Household Incomes - Certificates of Occupancy							Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions	Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Density Bonus							
10							11	12	13	14	15	16	17	18	19	20			21	22	23	24
Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) <u>Date Issued</u>	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (may select multiple - see instructions)	Deed Restriction Type (may select multiple - see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units	Demolished or Destroyed Units	Demolished/Destroyed Units Owner or Renter	Total Density Bonus Applied to the Project (Percentage Increase in Total Allowable Units or Total Maximum Allowable Residential Gross Floor Area)	Number of Other Incentives, Concessions, Waivers, or Other Modifications Given to the Project (Excluding Parking Waivers or Parking Reductions)	List the incentives, concessions, waivers, and modifications (Excluding Parking Waivers or Parking Modifications)	Did the project receive a reduction or waiver of parking standards? (Y/N)
0	0	0	8	0	15	24		47	0	0					4			0				
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			Known sales prices places them in the moderate income category. These are small affordable-by-design units consistent with State assumptions for urban dwelling units meeting affordable housing needs.								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0		N	Y			Known rent places them in the moderate income category								
					2		1/15/2021	2		N	Y			Known rent places them in the moderate income category								
						1	2/4/2021	1		N	Y											
			1				2/8/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
							6/16/2021	1		N	Y											
							3/1/2021	1		N	Y											
							3/31/2021	1		N	Y											
			1				6/18/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
					3		12/3/2021	3		N	Y			Known rent places them in the moderate income category								
					2		8/25/2021	2		N	Y			Known rent places them in the moderate income category								
					1		1/15/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
						1	10/11/2021	1		N	Y											
						1	7/28/2021	1		N	Y											
						1	12/2/2021	1		N	Y											
						1	3/11/2021	1		N	Y											
						1	7/8/2021	1		N	Y											
			1				1/7/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
						1	3/22/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
					1		3/22/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
						1	1/21/2021	1		N	Y											
						1	4/21/2021	1		N	Y											
						1	7/8/2021	1		N	Y											
						1	3/5/2021	1		N	Y											
						1	1/27/2021	1		N	Y											
						1	5/19/2021	1		N	Y											
						1	3/15/2021	1		N	Y											
						1	7/7/2021	1		N	Y											
						1	3/30/2021	1		N	Y											
						1	4/20/2021	1		N	Y											
						1	6/23/2021	1		N	Y											
			1				11/30/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
						1	9/14/2021	1		N	Y											
						1	12/22/2021	1		N	Y											
					1		5/26/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
			1				12/10/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
					1		6/22/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
			1				6/9/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
					1		11/30/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
			1				12/15/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
						1	8/31/2021	1		N	Y											

Affordability by Household Incomes - Certificates of Occupancy								Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions	Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Density Bonus						
10							11	12	13	14	15	16	17	18	19	20			21	22	23	24
Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) <u>Date Issued</u>	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (may select multiple - see instructions)	Deed Restriction Type (may select multiple see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units	Demolished or Destroyed Units	Demolished/Destroyed Units Owner or Renter	Total Density Bonus Applied to the Project (Percentage Increase in Total Allowable Units or Total Maximum Allowable Residential Gross Floor Area)	Number of Other Incentives, Concessions, Waivers, or Other Modifications Given to the Project (Excluding Parking Waivers or Parking Reductions)	List the incentives, concessions, waivers, and modifications (Excluding Parking Waivers or Parking Modifications)	Did the project receive a reduction or waiver of parking standards? (Y/N)
0	0	0	8	0	15	24		47	0	0						4		0				
				1			12/22/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
				1			10/25/2021	1		N	Y			Known rent places them in the moderate income category		1						
			1				9/8/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
				1			10/22/2021	1		N	Y			ADU'S 50% LOW and 50% MODERATE PER REGIONAL RENT STUDY								
								0														

Jurisdiction	Atascadero	
Reporting Year	2021	(Jan. 1 - Dec. 31)
Planning Period	6th Cycle	12/31/2020 - 12/31/2028

**ANNUAL ELEMENT PROGRESS REPORT**  
**Housing Element Implementation**  
 (CCR Title 25 §6202)

This table is auto-populated once you enter your jurisdiction name and current year data. Past year information comes from previous APRs.  
 Please contact HCD if your data is different than the material supplied here

Table B													
Regional Housing Needs Allocation Progress													
Permitted Units Issued by Affordability													
		1	2								3	4	
Income Level		RHNA Allocation by Income Level	2020	2021	2022	2023	2024	2025	2026	2027	2028	Total Units to Date (all years)	Total Remaining RHNA by Income Level
Very Low	Deed Restricted	207	-	3	-	-	-	-	-	-	-	3	204
	Non-Deed Restricted		-	-	-	-	-	-	-	-	-		
Low	Deed Restricted	131	-	1	-	-	-	-	-	-	-	18	113
	Non-Deed Restricted		5	12	-	-	-	-	-	-	-		
Moderate	Deed Restricted	151	-	1	-	-	-	-	-	-	-	58	93
	Non-Deed Restricted		4	53	-	-	-	-	-	-	-		
Above Moderate		354	36	66	-	-	-	-	-	-	-	102	252
Total RHNA		843											
Total Units			45	136	-	-	-	-	-	-	-	181	662

Note: units serving extremely low-income households are included in the very low-income permitted units totals and must be reported as very low-income units.  
 Please note: For the last year of the 5th cycle, Table B will only include units that were permitted during the portion of the year that was in the 5th cycle. For the first year of the 6th cycle, Table B will include units that were permitted since the start of the planning period.  
 Please note: The APR form can only display data for one planning period. To view progress for a different planning period, you may login to HCD's online APR system, or contact HCD staff at [apr@hcd.ca.gov](mailto:apr@hcd.ca.gov).

**ANNUAL ELEMENT PROGRESS REPORT  
 Housing Element Implementation**

(CCR Title 25 §6202)

<b>Jurisdiction</b>	Atascadero
<b>Reporting Year</b>	2021 (Jan. 1 - Dec. 31)

**Table D**

**Program Implementation Status pursuant to GC Section 65583**

**Housing Programs Progress Report**  
 Describe progress of all programs including local efforts to remove governmental constraints to the maintenance, improvement, and development of housing as identified in the housing element.

1	2	3	4
Name of Program	Objective	Timeframe in H.E	Status of Program Implementation

**Program 1.A: Adequate Sites**

(266 units) The City can adequately accommodate the City's current RHNA under existing General Plan and Zoning Regulations standards (266 units remaining after credits for approved projects). The residential sites inventory to address the current RHNA consists of 11 mostly vacant sites with capacity to yield 497 new units. The City will maintain an inventory of available sites for residential development and provide it to prospective residential developers upon request, and the City will continue to track the affordability of new housing projects and progress toward meeting the City's RHNA. The City will also continue allowing housing development on RMF-24 properties identified in the Housing Element Sites Inventory as a by-right use, not subject to a conditional use permit, specific plan, or discretionary action. By right includes but is not limited to housing developments in which at least 20 percent of the units are affordable to lower income households.

*Ongoing; annual assessment of status of housing sites inventory as part of the annual reporting process to the State*

2021 represents the first year of the city's 6th RHNA cycle. The City remains on-track to providing sites adequate for affordable housing. No identified sites have been developed above the affordability ranges listed in the housing element. The City has issued permits for Underutilized Site #2 (US) estimated to capture 10 units. 10 units are being constructed at this time.

**Program 1.B: No Net Loss**

The City will evaluate residential development proposals for consistency with goals and policies of the General Plan and the 2020-2028 Housing Element sites inventory and make written findings that the density reduction is consistent with the General Plan and that the remaining sites identified in the Housing Element are adequate to accommodate the RHNA by income level. If a proposed reduction of residential density will result in the residential sites inventory failing to accommodate the RHNA by income level, the City will identify and make available additional adequate sites to accommodate its share of housing need by income level within 180 days of approving the reduced density project.

*Ongoing; as part of the entire*

The City has not processed any applications for sites identified in the Housing element that do not align with Housing element goals and policies. The City has issued permits for Underutilized Site #2 for 10 units, as anticipated by the Housing Element.

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Program 1.C: Mixed-Use Development	<p><b>(5 mixed-use projects)</b> Continue to allow mixed residential and commercial development and promote second- and third-story residential development in the Downtown zoning districts. To increase project certainty and streamline development, the City will consider identifying appropriate, mid-block locations, outside of downtown, for future mixed-use/residential development (in commercial zoning districts) while considering appropriate jobs/housing balance and fiscal impacts. Considering market conditions and development costs, the City will provide, when possible, developer incentives such as expedited permit processing and flexible development standards for units that are affordable to lower-income households. The City will publicize these incentives on the City's website (www.atascadero.org) to make them available in a timely fashion.</p>	<p><i>Ongoing; identification of mixed-use opportunity areas as part of a comprehensive General Plan update (to be initiated in 2021)</i></p>	<p>The City continues to allow and supports mixed-use development within the Commercial retail, commercial Professional, and Commercial Neighborhood zoning districts. To date the City has approved construction for 1 downtown mixed-use project (The Block) within the Downtown area and permit are in process for 2 mixed-use projects outside of the downtown core (Cook Mixed-Use and 8120 Morro Rd)</p>
Program 1.D: Accessory Dwelling Units	<p><b>(255 units)</b> Promote the development of accessory dwelling units (ADUs) by adopting an ADU ordinance addressing the latest provisions in State law, including permit streamlining processes. Provide pre-approved ADU plans as a tool for encouraging development of ADUs and lowering plan review costs for applicants and the City. Promote development of ADUs by providing written information at the City's planning counter and on the City's website.</p>	<p><i>Ordinance within two years of Housing Element adoption</i></p>	<p>The City is in the process of scheduling an updated ADU ordinance for adoption (scheduled for April 2022). In 2021, 15 ADU's were issued certificates of occupancy.</p>
Program 1.E: Special Needs Housing	<p><b>(15 units)</b> Provide housing opportunities to meet the special housing needs of special needs residents (including the elderly, disabled, developmentally disabled, large families, the homeless, farmworkers, and extremely low-income households) by giving priority to development projects that include a component for special needs groups in addition to other lower-income households.</p>	<p><i>Ongoing</i></p>	<p>The City has approved an expansion to California Manor for 76 senior units. The project is awaiting grant funding. This project would target lower income residents.</p>
Program 1.F: Housing for Persons with Disabilities	<p><b>(25 units)</b> Assist in meeting the housing needs for persons with disabilities, including persons with developmental disabilities, by implementing the following actions:                  § Assist developers who seek state and federal monies in support of housing construction and rehabilitation targeted for persons with disabilities, including persons with developmental disabilities.                  § Provide regulatory incentives and concessions to projects targeted for persons with disabilities, including persons with developmental disabilities.                  § Work with local organizations such as the Tri-Counties Regional Center and Transitions Mental Health Association to implement an education and outreach program informing local families about housing and services available for persons with disabilities, including developmental disabilities. The program will include the development of an informational brochure available at libraries, and on the City</p>	<p><i>Support grant applications- at least once during the planning period; develop informational material - within two years of Housing Element adoption; provide incentives for development of housing for persons with disabilities - ongoing</i></p>	<p>The City approved an expansion to the empire Apartments project which houses lower income disabled individuals. The project would provide 15 new units and 15 rehabed units. The City actively supports the SLO Non-Profit Housing Corporation in securing grant funding for this project.</p>

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Program 2.A: Density Bonus	(50 units) Maintain an affordable housing density bonus ordinance that establishes procedures for obtaining and monitoring density bonuses in compliance with state law. Update the City's density bonus ordinance to remain in compliance with Government Code §65915.	Updated density bonus ordinance adoption - within two years of Housing Element adoption; reviewing ordinance for compliance with State law - ongoing	The City currently implements State law for all projects requesting use of the State Density Bonus program. Because State law focuses on moderate income, the City has not historically seen implementation of the density bonus program result in lower income units. However, some more recent mixed-use developments and higher density residential formats has resulted in 1 low income unit and 1 very low income unit (The Block, Emerald Court). In addition, the City has approved 4 non-profit projects that would target low income individuals that would add 152 low income units to the City's housing stock if funding can be obtained. These projects (Empire, Macadero, and Cal Manor, and Del Rio Ridge) utilized the State Density Bonus for development incentives as well as some bonus units)
Program 2.B: Inclusionary Housing Ordinance	(50 units) Evaluate the City's inclusionary housing policy and consider replacing the current inclusionary policy with an inclusionary housing ordinance. An inclusionary ordinance must be consistent with state density bonus regulations and address changing economic and regulatory considerations. The City will continue to monitor the impact of its inclusionary housing policy/ordinance on production of market rate housing in response to market conditions. If the City's inclusionary housing approach presents an obstacle to the development of the City's fair share of regional housing needs, the City will consider revising the policy/ordinance accordingly.	Review the City's current inclusionary housing policy within two years of Housing Element adoption	The City is in the process of reviewing options for an updated affordable housing strategy. As the strategy has been developed, program options have been discussed by the community and Council as the program is refined. Further Council and community input is scheduled for April.
Program 2.C: Affordable Housing In-Lieu funds	(5 affordable units) Evaluate the adoption of a policy to determine the best use of City Affordable Housing In-Lieu funds to support the creation of new affordable housing units in Atascadero. Work with affordable housing developers and identify funding to address the housing needs of extremely low-income households and totally and permanently disabled persons.	Affordable Housing In-Lieu funds policy evaluation within two years of Housing Element adoption; identify funding sources annually	The City will evaluate fund options once an affordable housing strategy is identified and adopted. The city has pledged \$400,000 of our current fund to Del Rio Ridge, a 42 unit non-profit low income project awaiting full funding opportunities.
Program 2.D: Affordable Housing Technical Assistance	Provide pre-application technical assistance to affordable housing providers to determine project feasibility and address zoning and code compliance issues in the most cost-effective and expeditious manner possible. If not already initiated via potential projects, annually consult with local affordable housing developers, including offering letters of support for grant applications, advising on local zoning and code compliance, and facilitating partnerships.	Ongoing and annual consultation	The City continues to provide pre-app consultation for all projects to determine feasibility and building and fore code standards. Recently, the city has coordinated with Del Rio Ridge and expansion of a non-profit transitional home for low income foster youth.
Program 2.E: Affordable Housing Development Incentives	Provide, when possible, developer incentives such as expedited permit processing and developer impact fee deferrals for units that are affordable to lower-income households, including extremely-low income households. Atascadero will promote these incentives to developers on the City's website and during the application process.	Ongoing	The City currently provides deferred impact fee payments for housing development deferring payment until permit final. Other incentives are being considered as part of the Inclusionary/affordable housing program noted above.

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<p><b>Program 2.F: Mixed-Use Standards</b></p>	<p>Adopt mixed-use development standards that facilitate high-quality development and that strike a balance between the community's need for housing and the City's need to preserve viable commercial land uses to help sustain the City's ability to provide essential services. During the formulation of development standards, the City will assess the potential for residential density increases for mixed-use projects. The City will pursue the drafting of new mixed-use developments standards and Objective Design Standards (Program 3.B) to ensure that the City's planning and design goals for mixed-use projects and multi-family housing are met.</p>	<p><i>Within two years of Housing Element adoption</i></p>	<p>The City received grant funding to develop objective design standards that include mixed-use development standards. The project is expected to be complete in early 2023.</p>
<p><b>Program 2.G: Specific Plans</b></p>	<p>Continue to require the use of specific plans or planned developments for residential projects of 100 or more single-family units to ensure that the distribution of land uses, infrastructure requirements, and implementation measures are consistent with the General Plan and the City's development goals and needs.</p>	<p><i>Ongoing</i></p>	<p>The City has commenced our comprehensive General Plan update and will continue to utilize Specific plans for larger-scale single-family residential developments.</p>
<p><b>Program 2.H: Resources to Address Homelessness</b></p>	<p>Continue working with non-profit organizations that address homelessness to aid residents in need and provide technical support as needed. Continue cultivating a close relationship with the El Camino Homeless Organization (ECHO) to maintain a safe and secure shelter that meets the immediate needs of families and individuals who have become homeless. Cooperate with non-profit groups and local religious organizations to allow the temporary use of churches as homeless shelters. Continue to support local programs that provide emergency resources such as motel voucher programs and emergency food provision.</p>	<p><i>Ongoing</i></p>	<p>The City works closely with local non-profit organizations to facilitate programs and locations that meet the needs of homeless and transitional populations.</p>
<p><b>Program 2.I: Single-Room Occupancy Units (SROs)</b></p>	<p>Review and, if necessary, revise siting regulations for single-room occupancy units (SROs) to comply with State law.</p>	<p><i>Within three years of Housing Element adoption as part of a future Zoning Regulations update</i></p>	<p>Staff has not yet begun this process. It is anticipated that SRO's will be analyzed as part of the City's comprehensive General Plan update.</p>
<p><b>Program Development Process Streamlining</b></p>	<p>Continue streamlining the project review process by: § Reviewing, and if necessary, revising local review procedures to facilitate a streamlined review process § Accommodating SB 35 streamlining applications or inquiries by creating and making available to interested parties an informational packet that explains the SB 35 streamlining provisions in Atascadero and provides SB 35 eligibility information § Continuing to consolidate all actions relating to a specific project on the same Council or Commission agenda § Continuing to review minor project modifications through the Design Review Committee and more substantial changes through a Planning Commission process § Maintaining pre-approved stock development plans to streamline the plan check process for ADUs</p>	<p><i>Ongoing; SB 35 informational material within two years of Housing Element adoption</i></p>	<p>The City continues to consolidate items on one agenda and provide pre application information to housing applicants. The City received grant funding to develop ADU stock plans and we anticipate availability of full construction plans by mid 2022.</p>

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<b>Program 3.B: Objective Design Standards</b>	<p>In compliance with SB 330, adopt objective design standards to ensure that the City can provide local guidance on design and clearly articulate objective design standards for by-right projects as allowed by state law. Adoption of objective design standards will facilitate high-quality residential development and compliance with state objectives. The objective design standards will ensure provision of adequate private open space, parking, and architectural features, consistent with state law. Part of the objective design standards creation process will include assessing how the standards can be used to encourage a variety of housing types and limit the size of residential units on multi-family zoned properties to encourage units that are affordable by design.</p>	<p><i>Within two years of Housing Element adoption</i></p>	<p>The City received grant funding to adopt objective design standards. The project is expected to be completed in early 2023.</p>
<b>Program 3.C: Multi-Family Housing Permitting</b>	<p>To reduce constraints to multi-family housing production, the City will review and revise the Conditional Use Permit (CUP) requirements for multi-family housing in conjunction with adoption of objective design standards and to comply with the Housing Accountability Act. The Atascadero Zoning Regulations require a CUP for residential projects in the RMF zone over 11 units, excluding RMF-24 properties identified in the Housing Element sites inventory, which are allowed by right. Any revisions to Zoning Regulations will not affect the by-right approval of multi-family projects in the RMF-24 zone on Housing Element sites, which are not subject to a CUP or a Specific Plan. Revisions are intended to facilitate the permitting process for multi-family housing and will be consistent with any by-right or streamlining requirements identified in state law. The City will periodically evaluate the approval process for housing projects to ensure compliance with the intent of the Housing Accountability Act.</p>	<p><i>Modify CUP requirement within two years of Housing Element adoption in conjunction with adoption of objective design standards; monitor approval process for housing development - ongoing</i></p>	<p>The City will review CUP triggers with the adoption of objective design standards.</p>
<b>Program 3.D: RMF Zone Height</b>	<p>Amend the Zoning Regulations to remove the Residential Multi-Family number of stories limit in the Residential (RMF) Zone and regulate Multi-Family (RMF) Zone and regulate based on height in feet, allowing for adequate emergency response and community character preservation. Amend Zoning Regulations definitions and exceptions to height limits, as appropriate, to facilitate three-story development in the RMF Zone.</p>	<p>Amend the Zoning Regulations to remove number of stories limit in the Residential Multi-Family number of stories limit in the Residential (RMF) Zone and regulate based on height in feet, allowing for adequate emergency response and community character preservation. Amend Zoning Regulations definitions and exceptions to height limits, as appropriate, to facilitate three-story development in the RMF Zone.</p>	<p>Completed - the City updated the zoning regulations in 2021 to remove the number of stories restriction and increase height for architectural features.</p>

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<p><b>Program 3.E: Small Lot Subdivisions</b></p>	<p>Consider adopting small lot subdivision standards that incorporate specific site and building development standards (such as parking, height, yard space, architecture) in exchange for flexible minimum lot sizes. Consider allowing small lot subdivisions without rezoning. Small lot subdivision standards can eliminate the need for multi-family planned developments that are currently subject to a rezoning process. Establishing a set of high-quality standards for each small lot subdivision, instead of minimum lot size, can save substantial staff time and applicant costs and would allow for increased creativity with site design while increasing ownership opportunities for all income segments of the community (affordable by design).</p>	<p><i>Ongoing; review small lot subdivisions as part of a Comprehensive General Plan and Zoning Regulations Update</i></p>	<p>The City received grant finding and is expected to adopt regulations with the adoption of the General plan Update in late 2024.</p>
<p><b>Program 3.F: Rural Residential Development Standards</b></p>	<p>Adopt a Rural Residential Zone in the Zoning Regulations consistent with its designation on the Zoning Map and standards that distinguish it from the Residential Suburban zone to facilitate the development of a variety of housing types.</p>	<p><i>Within three years of Housing Element adoption as part of a Comprehensive General Plan update</i></p>	<p>The City will review all zoning districts as part of the comprehensive General plan update and will adopt revisions as needed.</p>
<p><b>Program 3.G: Emergency Shelter (ES) Overlay Zone</b></p>	<p>Review the Emergency Shelter (ES) Overlay Zone for continued compliance with state law; evaluate the need and expand the zone, as appropriate, to other appropriate properties, subject to the locational and operational criteria outlined in the Zoning Regulations.</p>	<p><i>Within two years of housing element adoption</i></p>	<p>The City works closely with ECHO, the non-profit organization that runs the shelter in the existing ES overlay zone. The City will continue to monitor need for expansion and added services.</p>
<p><b>Program 3.H: Special Needs Housing Laws</b></p>	<p>Review the Zoning Regulations and if necessary, make changes to ensure compliance with the Supportive Housing Streamlining Act (AB 2162) and AB 101 (Low-Barrier Navigation Centers). AB 2162 requires supportive housing to be considered a use by right in zones where multi-family and mixed uses are permitted, including nonresidential zones permitting multi-family uses, if the proposed housing development meets specified criteria. AB 101 requires that Low-Barrier Navigation Centers (LBNC) be a by-right use in areas zoned for mixed-use and nonresidential zones permitting multi-family uses. LBNC provide temporary room and board with limited barriers to entry while case managers work to connect homeless individuals and families to income, public benefits, health services, permanent housing, or other shelter.</p>	<p><i>Within two years of adoption of the Housing Element</i></p>	<p>The City will be reviewing zoning districts and uses with the upcoming General Plan Update.</p>
<p><b>Program 3.I: Housing Financing Constraints</b></p>	<p>Continue to work with the development community to identify and mitigate any constraints on access to financing for multi-family development. The City will conduct regular stakeholder meetings with members of the development community, including representatives from local non-profit housing organizations, developers, and real estate brokers to solicit feedback. Continue to facilitate understanding of the impacts of economic issues, employment, and growth on housing needs among financial, real estate, and development professionals in formalized settings, such as the Economic Round Table.</p>	<p><i>Ongoing</i></p>	<p>The City communicates with non-profit organizations and housing developers regularly regarding funding challenges and grant opportunities. Unfortunately, most grant applications are heavily weighted to communities with State identified disadvantaged communities. Our local SLOCOG has revised this analysis to include additional factors that more accurately identify known areas that should be considered disadvantaged from a funding perspective however, these regional definitions cannot be used in many State level applications, creating additional funding obstacles for lower income housing opportunities.</p>

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<b>Program 3.J: Non-Governmental Constraints</b>	<p>Continue to monitor and evaluate development standards and advances in housing construction methods. Although the City has limited influence over non-governmental constraints, if non-governmental constraints are identified, the City will review, and if necessary, revise, any development regulations or processes that can potentially lessen those constraints.</p>	<i>Ongoing</i>	<p>The City continues to attend building industry seminars and is a lead participant in local ICC chapter meetings. Current identified constraints include solar requirements for new residential projects which significantly drive up costs, accessibility requirements that make projects infeasible when dealing with a City with challenging topography, State stormwater management requirements, limited funding for streets, roads, and other City infrastructure that drive up permit costs and fees, PG&amp;E costs and availability to support new construction, outdated disadvantaged community mapping that limits Atascadero's ability to be competitive in grant funding opportunities for affordable housing, infrastructure, and services, and cost of construction materials.</p>
<b>Program 3.K: Capital Facility Fees</b>	<p>To encourage affordability by design, the City will modify the Capital Facility Fee schedule to index fees based on size of unit, providing lower rates for small units where there is a demonstrated nexus. The City will continue to monitor impact fees and the Capital Facility Fee schedule to identify barriers to housing development, particularly affordable units. If constraints are identified, the City shall revise the fee schedule accordingly while balancing infrastructure needs to support housing development.</p>	<i>Capital Facility Fee modification within two years of Housing Element adoption; impact fee monitoring and revisions - ongoing</i>	<p>The City has adopted a fee schedule that reduces fees for the development of accessory dwelling units that are greater than 750 square feet and waives impact fees for units less than 750 square feet. The City is currently working with a fee consultant to update the capital facility fee program and evaluate a program that encourages smaller units and affordability by design.</p>
<b>Program 3.L: Water and Sewer Service Providers</b>	<p>In accordance with Government Code Section 65589.7, immediately following City Council adoption, the City will deliver to all public agencies or private entities that provide water or sewer services to properties within the City of Atascadero a copy of the 2020-2028 Housing Element. The City will also confirm that the agencies and entities providing water or sewer services have procedures in place to grant priority for the provision of water and sewer services to proposed developments that include housing units affordable to lower income households (Government Code Section 65589.7). The City will also explore possible options to ease the burden of water service fees (working with the Atascadero Mutual Water Company) and sewer service fees (through the Department of Public Works) for affordable housing projects (both deed-restricted and market rate affordable units).</p>	<i>Within 30 days of adoption of the Housing Element; coordination - ongoing</i>	<p>Completed - The City distributed the final Housing Element to key City Staff in charge of sewer facilities and to the Atascadero Mutual Water Company, the City's water service provider.</p>
<b>Program 3.M: Energy Conservation</b>	<p>Encourage and facilitate energy conservation and help residents minimize energy-related expenses by: § Promoting environmentally sustainable building practices that provide cost savings to homeowners and developers; § Providing informational material at the Community Development Department counters from PG&amp;E and others that detail energy conservation measures for new and existing buildings, the benefits of the Green Building (San Luis Obispo Green Build), and resources to assist lower-income households with energy-related expenses; and § Continuing to strictly enforce the state energy standards of the California Green Building Code.</p>	<i>Ongoing</i>	<p>The City continues to comply with this program</p>
<b>Program 3.N: Definition of Immediate Family</b>	<p>Amend the Zoning Regulations to remove the definition of "immediate family" from the Zoning Regulations and any standards related to that definition, including Section 9-6.107(a)(1)(i) and 9-6.107(a)(3), which requires immediate family to occupy accessory dwelling units in the A zone.</p>	<i>Within two years of Housing Element adoption</i>	<p>This update is scheduled for 2022</p>

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Program 3.O: Farmworker Housing in RS Zone	Zone to comply with California Health and Safety Code Section 17021.6, which generally requires that employee housing consisting of no more than 36 beds in group quarters (or 12 units or less designed for use by a single household) be treated as an agricultural use.	Within two years of Housing Element adoption	Updates to the RS zone have nbeen completed.
Program 4.A: Housing Rehabilitation and Preservation	(20 units) As new projects, code enforcement actions, and other opportunities arise, the City will investigate ways to meet its housing needs through rehabilitation and preservation of existing units. The City will continue using code enforcement to identify housing maintenance issues and to expedite rehabilitation of substandard and deteriorating housing by offering technical assistance to homeowners and occupants.	Ongoing	While the City does not have many units that are considered unsafe or degraded, local non-profit organizations regularly look at grant finding opportunities to expand and rehabilitate existing lower income housing development. The City has recently approved 2 such projects (Empire Apartments and Macadero Apartments) that will rehabilitate approximately 34 units and add an additioanal 21 units under renewed 55 year deed restrictions. These projects are awaiting secured funding.
Program 4.B: Community Development Block Grant	Continue to participate in federal grant programs, such as the Community Development Block Grant (CDBG) program, to obtain loans and/or grants for housing rehabilitation and homeless services.	Ongoing	The City participates in federal grant programs including CDBG, while seeking other grant opportunities, however there are limited funds available in our region and most funds are utilized for minor accessibility improvements to aid pedestrain access near housing and transit.
Program 4.C: Affordable Housing Preservation and Development	Continue to work with non-pront agencies, such as the County Housing Authority, Habitat for Humanity, the San Luis Obispo County Housing Trust Fund, and Peoples' Self-Help Housing, to preserve existing affordable housing and to pursue funding for new affordable housing units. Utilize inclusionary housing funds, as available and appropriate, to assist in the development of affordable housing by non-profit agencies. Continue to encourage developers to work with agencies such as the California Housing Finance Authority (CHFA) and the Department of Housing and Urban Development (HUD) to obtain loans for development of new multi-family rental housing for low-income households. Specifically, the City will: ☐ Contact potential affordable housin developers ☐ Assist non-profits and other housin advocates in preparing applications for funding opportunities and financings ☐ Provide regulatory concessions an incentives, as necessary, to encourage and facilitate the construction of affordable housine	Annual meetings, during preparation of annual review of the Housing Element, to discuss funding opportunities, vacant and opportunity sites, and status of affordable housing projects; ongoing collaboration	Local non-profit organizations regularly look at grant finding opportunities to expand and rehabilitate existing lower income housing development. The City has recently approved 2 such projects (Empire Apartments and Macadero Apartments) that will rehabilitate approximately 34 units and add an additioanal 21 units under renewed 55 year deed restrictions. These projects are awaiting secured funding. City Staff assists with grant applicaitons when needed.
Program 4.D: Affordable Housing at Risk of Conversion	The City will continue to monitor the status of subsidized affordable projects, rental projects, and mobile homes in the City and provide technical and financial assistance, when possible, to ensure long-term affordability. This will involve contacting owner/operators of subsidized projects annually to determine the status of the units and their potential to convert to market-rate. If projects are at risk, the City will maintain contact with local organizations and housing providers who may have an interest in acquiring at-risk units. The City will keep track of and apply for funding opportunities to preserve at-risk units and assist other organizations in applying for funding to acquire at-risk units.	Contact owners/operators annually and ongoing	The City does this as part of our annual affordable hosuing verification outreach.

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Name of Program	Objective	Timeframe in H.E	Status of Program Implementation

<p><b>Program 4.E: Housing Choice Vouchers</b></p>	<p>(preserve 230 vouchers) Continue to work with the Housing Authority of San Luis Obispo (HASLO) for administration of the Housing Choice Voucher program (formerly Section 8). The City utilizes this relationship for program implementation and income verifications and will support additional Housing Choice Vouchers in the community.</p>	<p>Ongoing</p>	<p>The City continues to support this program</p>
<p><b>Program 4.F: Historic Building Conservation</b></p>	<p>Preserve and protect homes that have historical and architectural significance, such as the Colony homes, through continued implementation of the Historic Site (HS) overlay zone and by maintaining a GIS-based map of historic buildings and sites.</p>	<p>Ongoing</p>	<p>The City currently maintains a database of historic homes and continues to encourage use of the Secretary of Interior's standards. The City is in the process of preparing a historic preservation ordinance to codify policies.</p>
<p><b>Program 4.G: Condominium Conversion</b></p>	<p>Continue enforcing the Condominium Conversion Ordinance (Chapter 12 of the Zoning Regulations) to reduce the impacts of condominium conversions on lower-cost rental housing.</p>	<p>Ongoing</p>	<p>The City continues to enforce the condo conversion ordinance</p>
<p><b>Program 4.H: Infrastructure</b></p>	<p>Prioritize street and infrastructure improvement projects to benefit high-need areas, including existing high-density residential areas.</p>	<p>Ongoing</p>	<p>The City rates roads annually based on existing conditions and maintenance schedules. The Majority of the City's high density residential locations are located along EL Camino, our most significant Arterial.</p>
<p><b>Program 5.A: Fair Housing Services</b></p>	<p>Continue to provide information and complaint referral services for those persons who believe they have been denied access to housing because of their race, religion, sex, marital status, ancestry, national origin, color, or disability, family status, sexual orientation, source of income, or political affiliation. The City will educate Community Development Department staff on how to respond to complaints received regarding potential claims of housing discrimination. Staff will be trained to provide the person with an informational handout detailing the process of reporting and filing a claim through the California Department of Fair Employment and Housing. The staff will notify the City Manager and the City Attorney's office of the intent to file a claim and will be available to provide assistance to the person filing a claim, as needed. Information on Fair Housing law and how to file a claim will also be available on the City's website and at the Community Development Department.</p>	<p>Ongoing; online fair housing information to be available within one year of Housing Element adoption</p>	<p>The City provides informatroin and has brochures available at our front counter and on-line</p>

**ANNUAL ELEMENT PROGRESS REPORT  
 Housing Element Implementation**

(CCR Title 25 §6202)

<b>Jurisdiction</b>		Atascadero	
<b>Reporting Year</b>		2021	(Jan. 1 - Dec. 31)
<b>Table D</b>			
<b>Program Implementation Status pursuant to GC Section 65583</b>			
<b>Housing Programs Progress Report</b>			
Describe progress of all programs including local efforts to remove governmental constraints to the maintenance, improvement, and development of housing as identified in the housing element.			
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>Name of Program</b>	<b>Objective</b>	<b>Timeframe in H.E</b>	<b>Status of Program Implementation</b>
<b>Program Affirmatively Fair Housing</b>	<p>The City will promote and affirmatively further fair housing opportunities and promote housing for all persons, including those protected by the California Fair Employment and Housing Act and any other state and federal fair housing and planning law. The City will:</p> <p><input checked="" type="checkbox"/> Ensure that all development applications are considered, reviewed, and approved without prejudice to the proposed residents, contingent on the development application's compliance with all entitlement requirements.</p> <p><b>5.B: Further</b> <input checked="" type="checkbox"/> Accommodate persons with disabilities who seek reasonable waiver or modification of land use controls and/or development standards pursuant to procedures and criteria set forth in the Zoning Regulations.</p> <p><input checked="" type="checkbox"/> Work with the County of San Luis Obispo to implement the regional Analysis of Impediments to Fair Housing Choice and HUD Consolidated Plan.</p> <p><input checked="" type="checkbox"/> Facilitate public education and outreach by creating informational flyers on fair housing that will be made available at public counters, libraries, and on the City's/County's website</p>	<p>Ongoing</p>	<p>The City continues to support and work with groups to further fair housing and access to public meetings.</p>
<b>General Comments:</b>			

<b>Jurisdiction</b>	Atascadero	
<b>Reporting Year</b>	2021	(Jan. 1 - Dec. 31)
<b>Planning Period</b>	6th Cycle	12/31/2020 - 12/31/2028

<b>Building Permits Issued by Affordability Summary</b>		
<b>Income Level</b>		<b>Current Year</b>
Very Low	Deed Restricted	3
	Non-Deed Restricted	0
Low	Deed Restricted	1
	Non-Deed Restricted	12
Moderate	Deed Restricted	1
	Non-Deed Restricted	53
Above Moderate		66
<b>Total Units</b>		<b>136</b>

Note: Units serving extremely low-income households are included in the very low-income permitted units totals

<b>Units by Structure Type</b>	<b>Entitled</b>	<b>Permitted</b>	<b>Completed</b>
SFA	0	10	0
SFD	4	37	24
2 to 4	0	12	7
5+	144	52	0
ADU	0	24	15
MH	0	1	1
<b>Total</b>	<b>148</b>	<b>136</b>	<b>47</b>

<b>Housing Applications Summary</b>	
Total Housing Applications Submitted:	7
Number of Proposed Units in All Applications Received:	210
Total Housing Units Approved:	210
Total Housing Units Disapproved:	0

<b>Use of SB 35 Streamlining Provisions</b>	
Number of Applications for Streamlining	0
Number of Streamlining Applications Approved	0
Total Developments Approved with Streamlining	0
Total Units Constructed with Streamlining	0

<b>Units Constructed - SB 35 Streamlining Permits</b>			
<b>Income</b>	<b>Rental</b>	<b>Ownership</b>	<b>Total</b>
Very Low	0	0	0
Low	0	0	0
Moderate	0	0	0
Above Moderate	0	0	0
Total	0	0	0

Cells in grey contain auto-calculation formulas



# 2021 Annual General Plan and Housing Element Progress Report





**“Dedicated to enhancing, and preserving Atascadero’s character and safety by helping people plan, and build quality projects.”**



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## Section 1 – Introduction

### 1.1 Introduction

Every year, the City produces a report on the status of its General Plan and Annual Housing Progress (APR) to provide an overview of actions taken to implement this comprehensive plan during the past year, consistent with California Government Code section 65400, subdivision (a)(2). This report is provided to the City Council, Planning Commission, and other interested parties to assist in gauging the progress the City is making on the programs related to the General Plan and housing production. The annual report fulfills State law requirements and evaluates the number of housing units that have been approved and completed. The Housing APR, along with a General Plan Progress report, must be reported to the Department of Housing and Community Development (HCD) and the Office of Planning and Research (OPR).

## Section 2 – General Plan Activities

### 2.1 General Plan Activities

The General Plan states the community's goals, objectives, policies, and implementation measures (i.e., ways to achieve the goals and objectives). As a policy document, the General Plan establishes goals and policies for decision makers. Using these policies, City staff, the City Council, and Planning Commission take steps toward achieving the larger goals of the City. The City focuses implementation programs contained in the General Plan through daily operations of the City.

The City's General Plan was adopted in June 2002. The City's last major update of the General Plan was undertaken in 2020 with the City's adoption and certification of the 2021-2028 Housing Element Update. The City began its comprehensive General Plan Update process in early 2021 and is expected to adopt a new General Plan in 2024 that will provide a city blueprint through 2045.

## Section 3 – Planning & Building Yearly Activities

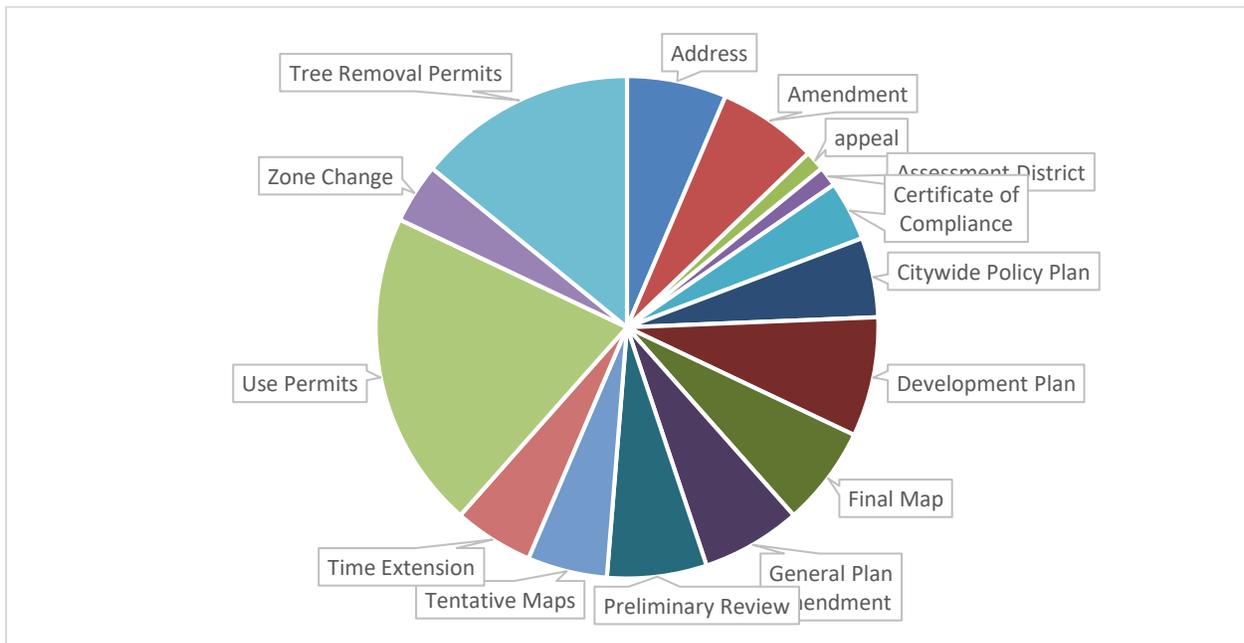
### 3.1 2021 Planning Division Applications & Entitlements

#### The Planning Division Highlights

- 79 applications processed in 2021



## 2021 Planning Projects



### **3.2 2021 Building Division Applications & Inspections**

#### *2021 Highlights*

- Received and processed 1,660 building permit applications
- In 2021, City building inspectors made 1,220 construction and safety-related inspections associated with building permit activity.
- The Building Division “finaled” or completed 734 building permits

### **3.3 Housing & Residential Growth**

The California Department of Finance (DOF) data estimates that the City’s population in 2021 is 29,623 residents. This is an estimated decrease of 1.4 percent in population since 2020. Between 2020 and 2021, housing production increased from 45 units to 136 units. This increase is likely attributed to the COVID pandemic disruptions in 2020. The City adopted an updated Housing Element in late 2020 and began progress toward the 6<sup>th</sup> cycle RHNA. The City is also commencing a citywide comprehensive General Plan Update slated to be completed in early 2024.

The following table shows residential projects of significance under construction or entitled in 2021, along with the number of affordable units in the project.



<b>Major Residential (Development Review and/or Construction) Activity in 2021</b>					
<b>Project Name</b>	<b>Address</b>	<b>Housing Type</b>	<b>Number of Units (remaining Entitlement)</b>	<b>Number of Units (Construction or Finaled)</b>	<b>Number of affordable or accessible units</b>
Grand Oaks Micro Community	4177 El Camino Real	Detached Single-Family / Live-work	4	26 (under construction)	3 deed restricted, 27 affordable by design (moderate)
Curbaril PD	7900 Curbaril	Planned Development	4		0
Emerald Court	2505 El Camino Real	Residential Multifamily	11		1 very low
Emerald Ridge	2605 El Camino Real	Residential Multifamily	172	36 (under construction)	0
La Plaza	6500 El Camino Real	Mixed-Use		4 finaled, 38 (under construction)	0
Cerro Robles	Halcon and Viejo Camino	Single-Family		17 (finaled)	0
Ten850	10850 El Camino Real	Attached single-family / multi-family	17	(58) Under construction	15 (potential for more as affordable by design - moderate)
The Block	5802 Traffic way	Mixed-use		11 (Under construction)	1 (potential for more as affordable by design - moderate)
Santa Ysabel Townhomes	7298 Santa Ysabel	Residential Multifamily		10 (under construction)	0 (potential for affordable by design - moderate)

**RHNA 2020-2028**

State housing law requires that each municipality establish quantified objectives for their fair share of regional housing needs by income group. Deed-restricted affordable housing counts towards meeting the quantified objectives. The quantified objectives are for the period of 2020-2028. The City recently adopted 6<sup>th</sup> Cycle Housing Element with a RHNA of 843 total units. The City has made strides toward meeting it’s RHNA obligation in each income category. Grant funding opportunities will be key to achieving the low and very-low allocation.



	Ext/Very Low	Low	Mod	Mkt rate	TOTAL
2020		5	4	36	45
2021	3	13	54*	66	136
<b>RHNA</b>	<b>204</b>	<b>131</b>	<b>151</b>	<b>354</b>	<b>843</b>
Remaining Balance	207	113	93*	252*	662

\* includes affordable-by-design units

### **3.4 Non-Residential Development**

The following table shows significant non-residential permits ranked by project valuation provided as a part of building permit issuance in 2021. In addition, La Plaza continues to move forward and is nearing completion, which will add significant commercial opportunities to the downtown core.

<b>2020 Non-Residential Building Permits Issued and Processing</b>					
<b>Business Name</b>	<b>Permit Status</b>	<b>Address</b>	<b>Project Type</b>	<b>Valuation</b>	
Arco Gas Station	Issued	9590 El Camino Real	New Construction	\$ 482,801	
La Plaza	Issued	6500 El Camino Real	New Construction	\$ 8,800,000	
Taco Bell	Permit Prep	7835 El Camino Real	New Construction	\$ 1,300,000	
Montecito Offices	Issued	9630 El Camino Real	New Construction	\$ 2,317,000	
The Block	Issued	5802 Traffic Way	New Construction	\$ 992,721	

