



# City of Boerne Unified Development Code

Professional Services Agreement

RFP# 0918-01

# City of Boerne

# Unified Development Code

## Authorization for Professional Services for

### RFP# 0918-01

**Submitted to:**

City of Boerne, Texas  
February 5, 2019

**Submitted By :**

MOSAIC Planning & Development Services  
18756 Stone Oak Parkway, Suite 200  
San Antonio, TX 78258

**Point of Contact:**

Carissa Cox, AICP  
carissacox@mosaicplans.com  
210.995.0393

# AUTHORIZATION FOR PROFESSIONAL SERVICES

## I. CLIENT INFORMATION

- A. **Name:** City of Boerne, Texas
- B. **Address:** City of Boerne  
402 E. Blanco  
Boerne, Texas 78006
- C. **Contact:** Nick Colonna, AICP  
Assistant Director of Planning and Community Development

## II. PROJECT DESCRIPTION

- A. **Project Name:** Boerne Unified Development Code
- B. **General Description of Services:** MOSAIC will provide professional planning services for the creation of the Boerne Unified Development Code, as defined in this agreement. This will include the work described in *Exhibit A Scope of Services*.
- C. **Compensation:** The services described herein will not exceed \$177,300.00, in accordance with *Exhibit C Fees*. The project will be split into two phases, over two fiscal years. Phase One costs will not exceed \$125,400.00. Phase Two costs will not exceed \$51,900.00. MOSAIC will be compensated monthly, on a percent completion basis by task.
- D. **Effective Date:** The terms of this agreement will be in effect beginning on the date of execution of the notification to proceed and shall remain in effect until March 31, 2020.

## III. IDENTIFICATION OF EXHIBITS

- Exhibit A Scope of Services
- Exhibit B Project Timeline
- Exhibit C Project Costs
- Exhibit D Deliverables
- Exhibit E Illustrations
- Exhibit F Labor and Workload
- Exhibit G Current Project Commitments
- Exhibit H Insurance

#### IV. TERMS AND CONDITIONS

1. **Scope.** MOSAIC Planning and Development Services, LLC (hereafter referred to as "MOSAIC") agrees to perform the services referenced in this agreement, according to the terms and conditions defined herein.
2. **Entirety of Contract.** This Authorization for Professional Services is binding for both parties and constitutes the entire agreement between MOSAIC and the City of Boerne (hereafter referred to as "the Client") for professional services pertaining to the Boerne Unified Development Code (hereafter referred to as "the Project"), as defined herein. No prior oral or written understanding shall be valid or enforceable unless set forth in this contract.
3. **Changes to this Agreement.** This Agreement may not be modified or altered except by written amendment executed by both parties.
4. **Exclusions.** Professional services as described in this Agreement shall consist solely of planning services. No engineering, legal or architectural services shall be rendered under this Agreement. Also excluded from this agreement are any meetings, products or services not identified in this Agreement.
5. **Responsibility.** MOSAIC shall render professional planning services only. Any payments made by the Client are compensation solely for such services. MOSAIC planners shall not be required to provide any seal, certification, assignment or warranty of their work. MOSAIC's review or supervision of work prepared and performed by other individuals or firms independently retained by the Client, with respect to the Project shall not relieve those individuals or firms of complete responsibility for the adequacy of their work. MOSAIC will not be responsible for errors and omissions of a subsequent consultant retained by the Client.
6. **Assignments.** MOSAIC shall not assign interest in this agreement to another consultant without the written consent of the Client.
7. **Invoices.** MOSAIC shall submit monthly invoices based upon percent of work completed by task, in a format acceptable to the Client. Invoices shall be accompanied by project progress reports that provided a detailed description of all work performed during the invoice period. Invoices may either be emailed to ncolonna@boerne-tx.gov or submitted by mail to Nick Colonna, Boerne Planning and Community Development Department, 402 E. Blanco, Boerne, Texas 78006.
8. **Expenses.** All expenses incurred by MOSAIC in association with the provision of services defined herein are included in the costs contained in Exhibit C. They shall not be separately reimbursed by the Client.
9. **Payment.** Compensation for all services shall be paid in San Antonio, Bexar County, Texas. The Client agrees to pay monthly invoices within 30 days of receipt of invoices. For services requested which are beyond the scope of this agreement, work shall be billed in accordance with MOSAIC's hourly rate schedule.
10. **Failure to Pay.** If the client fails to make payments to MOSAIC in accordance with this agreement, such failure shall be considered substantial non-performance and cause for termination or, at MOSAIC's option, cause for suspension of performance of service under this agreement. Prior to suspension of service, MOSAIC shall give fourteen (14) days written notice to the Client, should MOSAIC elect to suspend service due to non-payment. In the event of a suspension of services, MOSAIC shall have no liability to the client for delay or damage caused to the client because of such suspension of services. The Client agrees to hold MOSAIC harmless from and completely indemnify MOSAIC from and against any and all damages, costs, attorney's fees, and/or other expenses which MOSAIC may incur as a result of any claim by any person or entity arising out of such suspension of work. Before resuming services, MOSAIC shall be paid all sums due prior to suspension and any

expenses incurred in the interruption and resumption of MOSAIC's services. MOSAIC's fees for the remaining services and the time schedules shall be equitably adjusted.

11. **Timeliness of Performance.** MOSAIC will perform the services defined in this Agreement in a manner consistent with Exhibit B: Updated Project Timeline. MOSAIC shall not be responsible for delays in meeting project deadlines that result from causes beyond MOSAIC's reasonable control. Should the project go "on hold" for more than sixty (60) days, MOSAIC reserves the right to charge a \$500.00 restart fee.
12. **Rights of Use.** MOSAIC grants the Client non-exclusive license to use all drawings, illustrations, documents and data produced under this agreement.
13. **Severability.** Should any provision contained in this agreement for any reason be held to be void, invalid, illegal or unenforceable, such determination shall not affect any other provision hereof and this Agreement shall be considered as if the entirety of such void, invalid or unenforceable provision had never been contained in this agreement.
14. **Disputes.** The Client and MOSAIC agree that all disputes between them arising out of or relating to this Agreement shall be submitted to non-binding mediation. In the event that the parties to this Agreement are unable to reach a settlement through mediation, then such disputes shall be settled through litigation, in a court of competent jurisdiction.
15. **Jurisdiction.** This Agreement shall be administered and interpreted under the laws of the State of Texas. Exclusive venue shall lie in any court of competent jurisdiction located in the County in which the services are performed.
16. **Notification.** All notification to either party by the other that is required under this Agreement shall be personally delivered or mailed to such party at the following respective addresses:

**MOSAIC:**

Carissa Cox, AICP  
MOSAIC Planning and Development Services  
18756 Stone Oak Parkway, Suite 200  
San Antonio, Texas 78258

**City of Boerne:**

Nick Colonna  
Boerne Planning and Community Development Department  
402 E. Blanco  
Boerne, Texas 78006

**V. AUTHORIZATION TO PROCEED**

MOSAIC is hereby authorized to proceed with the work identified in this agreement, according to all terms and conditions identified herein.

**MOSAIC Planning and Development Services, LLC**

Represented by : \_\_\_\_\_  
Carissa Cox, AICP  
Principal Planner

Date: \_\_\_\_\_

**The City of Boerne**

Represented by : \_\_\_\_\_  
Name:  
Position/Title:

Date: \_\_\_\_\_

# EXHIBIT A: SCOPE OF SERVICES

A Unified Development Code is more than a joining of various chapters of the City's code of ordinances. It is a full integration of the various regulations related to development, organized in a way that is easy to read, to implement, and to enforce. The following work scope contains those tasks that MOSAIC feels are necessary to develop the Unified Development Code for Boerne. The tasks are organized into seven parts and address the priorities identified in the Request for Proposals, as well as modifications discussed at the project interview.

As discussed at the interview, MOSAIC recommends spreading the work on the UDC over two phases. Phase One would be dedicated to content generation and would be completed by the end of this fiscal year, including the adoption process. Phase Two would focus on supplementary visuals for the UDC, namely text illustrations and the creation of a UDC Handbook. It would be completed in FY2019-2020.

The Work Program is a description of services to be provided. The tasks will be spread out over two fiscal years, with the goals of UDC adoption before the end of 2019 and total project completion by March 31, 2020.

## Task 1: Project Oversight

A Unified Development Code (UDC) is a complex product that requires much communication. Transparency and regular updates for the community are needed, in order to show how regulations can be expected to change. There are multiple departments and administering agents that will regularly use the document, therefore time needs to be dedicated to effective communication between the consultant and the client. To ensure that the project stays on schedule, and that communication is effective, the following sub-tasks have been defined.

- 1.1 Monthly Project Update Memos.** MOSAIC will provide monthly memos that summarize highlights of the previous month, including content generated, meetings attended, and any major issues or challenges addressed. Percent completion information will also be provided for each major part of the work scope.
- 1.2 Project Management and Oversight.** MOSAIC will maintain regular communication with the City's project manager throughout the project process, as a way to discuss progress, inputs received from the community, and upcoming milestones and events. All content that requires input and review will be sent to the Client in a timely manner.
- 1.3 Project Kick-Off and Refined Work Program.** As quickly as possible after project initiation, a project Kick-Off Meeting will be used to establish a refined work program. This is a critical component of this project, as the timeline is condensed. Identifying windows where public meetings are (and are not) most feasible, defining content the consultant will need to produce for the City's website, and finalizing the role and engagement of the Steering Committee will all be decided at this Kick-Off Meeting. A summary of decisions resulting from that meeting will lead to a refined work program, and a detailed schedule to guide the remainder of the project process. This will increase both productivity and predictability as the UDC is developed. Key staff that will be involved in UDC development should participate in the Project Kick-Off Meeting. It could be conducted in one entire day or broken up in to two consecutive half-day sessions, according to staff scheduling and availability.
- 1.4 Staff Interview Guide.** MOSAIC will develop an interview guide that the Client can use to gather Staff Inputs at project outset. The contents of this guide would allow staff inputs to be concise, yet gathered over time, rather than in a fixed interview setting. The inputs gathered through this interview process will enhance the consultants knowledge and understanding of the administration of the development regulations in Boerne. This helps significantly with code administration and enforcement once adopted. City documents that the consultants would need to review (such as plans, guidelines and specifications) would be identified within this guide.
- 1.5 Presentation Template.** Public outreach and communications will be important for the success of the UDC. Since MOSAIC may not be

# EXHIBIT A: SCOPE OF SERVICES

able to participate in every needed event, MOSAIC will develop a presentation template for staff use. This will encourage consistency in the visual elements of the project. We will develop an initial template at project outset, and will revisit the template before moving into the communications and adoption stage of the project (the final three to four months). A final summary presentation of the project will be provided to Staff once all of the content is generated. This will be a combination of the presentations that MOSAIC will use for UDC orientation.

**1.6 Steering Committee General Meetings.** The Steering Committee will be critical to overall project success, and therefore regular communication between the Committee and the consultant will be important. This scope calls for a total of ten (10) in-person Steering Committee Meetings at key points throughout the process, spread out over both project phases. During Phase One, the Steering Committee will meet six (6) times. The first meeting will provide a general overview of project purpose and process, and will take place as soon as the Selection Committee is in place. The remaining six (6) Phase One meetings will focus on content review, and have been included in Task Four.

For Phase Two, four (4) Steering Committee meetings have been included. A total of seven (7) meetings are recommended for Phase One, with four (4) Steering Committee meetings for Phase Two included in Task Eight. The windows for each of these meetings will be established as a part of the Refined Work Program (Task 1.4), taking the City calendar of major events into account.

**1.7 Final Document Prints.** Once the final version of the UDC is adopted, MOSAIC will produce 25 printed copies of the document. These full copies will be tabbed and inserted into 3-ring binders to make them easier to navigate. A digital PDF copy of the document will also be provided at that time. The target date for final prints is December 2019, and will occur in the month following adoption.

## Task Two: Framework and Formatting

MOSAIC will conduct an internal document review, establish a working framework and will also format the final document for online publishing, according to the City's preferred format.

**2.1 Internal Document Review.** MOSAIC will review the current development regulations of the City, as well as other related plans and guidelines that will influence UDC creation (such as the Comprehensive Plan and the Boerne Historic Design Guidelines).

**2.2 UDC Framework and Working Outline.** A working framework helps the production process. It also aids in communication and ensures that no pieces of the current code fall through the cracks. Based on inputs from the Staff Interviews (Task 1.4), guidance received at the Project Kick-Off Meeting (Task 1.3), and our findings gathered through the Internal Document Review (Task 2.1), MOSAIC will set up a framework and working outline for the UDC. This will guide not only production, but product review and orientation as well. The Steering Committee will provide feedback for this proposed structure as a part of the their General Project Orientation Meeting (Task 1.6). The chapters for the UDC will be defined in this Task, as will major sections within those chapters.

**2.3 Re-format for Online Publishing.** Although the document will be published toward the end of the project, the format for online publishing will influence how the document is developed. Some online publishing resources allow codes to be published as PDF documents, which can be flipped through much like a magazine. Others utilize a format that is navigated through tabs and other page elements, much like a website. It is this latter format that we would recommend for this project. Although published PDF documents can be visually pleasing and engaging, they have limited functionality when the document is used as a reference. This is why the majority of cities use online publishing resources dedicated solely to codes of ordinances. Boerne's Code of Ordinances is currently being maintained with Municode. I would recommend modifying the City's subscription to these services and publishing the UDC on Boerne's Municode site, as a separate document, distinct from the Code of Ordinances. Municode has recently upgraded their user interface significantly, and it is one of the easiest online options to navigate, share and reference. This makes it very practical when it comes to everyday use. They also have the capability to include illustrations and other graphic



# EXHIBIT A: SCOPE OF SERVICES

components. We recommend making the determination about online document publishing as soon as possible in the process, as maintenance of those types of site will involve the City's IT department and the office of City Secretary. It will also impact how the document itself is crafted, to be most efficient with production.

## Task Three: Edits and Content Generation

The Unified Development Code is a large document with a significant amount of content that must be reviewed, formatted and edited. During this process, gaps will be identified where new text is needed, and outdated regulations will need to be removed. We have found that it is best to proceed with edits and content generation based on the chapters of the UDC (defined in Task 2.2). Although these may change slightly based on findings and feedback in Parts One and Two, the general chapters of a UDC are those identified here.

**3.1 General Provisions.** The General Provisions provide guidance for how the UDC will be interpreted and applied. Some cities include definitions in this chapter, but they could also be located elsewhere. It is anticipated that most of the work to be done on this chapter would involve editing and re-organization of content in the City's current code.

**3.2 Administrative Agents.** This chapter would define all of the bodies (elected and appointed) that are involved in the development process for the City, including the Planning and Zoning Commission, Zoning Board of Adjustment, other boards and commissions, and administrative agents of the City. It is anticipated that most of the work to be done on this chapter would involve editing and re-organization of content in the City's current code. This content could be incorporated into the Procedures chapter or into General Provisions. Final formatting will be determined at the Project Kick-Off Meeting.

**3.3 Procedures.** The Procedures chapter is a critical piece of the Unified Development Code, as it prescribes the procedures for review and approval of all of the various permits and entitlements that are needed to develop, occupy and use a property. One of the more pronounced differences between a UDC and conventional chapter approach to development regulation is the omission of a chapter dedicated to land subdivision. Land subdivision is achieved through the platting process, and is therefore a section within the procedures chapter of a Unified Development Code. In addition the platting, the Procedures chapter will also address Zoning procedures, non-conforming uses, vested rights, appeals and any other permits that are required by the City as part of the development process. Although significant changes are not anticipated for this chapter, careful consideration of content is important because this is the chapter that carries the greatest legal exposure for the City.

**3.4 Zoning and Zoning Map Amendments.** The Zoning chapter is another significant component of a UDC. The difference in the UDC organization is that this chapter focuses solely upon uses and dimensions, and does not address standards for site design (those are addressed in another chapter). The work to be done on the zoning chapter would be significant. It would include revision of the base zoning categories themselves, removing categories that are no longer relevant and adding categories that are needed. Overlay districts and special districts would also comprise a section of the Zoning Chapter. The master use table and master table of dimensions would be revisited, to ensure that the permitted uses and dimensional standards reflect current development practices as well as the preferences of the Boerne community. Also included in this sub-task is consultation related to the zoning map amendment, and the creation of an assignment criteria matrix for that new map. The zoning chapter will require a significant level of effort to develop.

In addition to zoning text, MOSAIC will provide support to City Staff that will be needed to update the City's zoning map. MOSAIC will provide a memo with an assignment criteria matrix to guide ensure that any changes are in keeping with the modified text, and consistent with the newly adopted comprehensive plan.

**3.5 Development Standards** The Development Standards could be developed as one single chapter or as two separate chapters, depending on City preference. This is because the City maintains some development standards that are related to land development (drainage, clearing, streets, utilities, etc.) and some that are related to site development (lighting, parking, landscaping, signage, etc.). One

# EXHIBIT A: SCOPE OF SERVICES

consideration for this breakdown is jurisdiction. Since UDCs are intended to simplify, integrate and organize various aspects of development regulation, it is best to allow jurisdiction to inform your organizational structure. A clear line of demarcation here is helpful here. In addition to text and formatting changes related to content in the development standards (parking, sidewalks, landscaping, etc.), MOSAIC will provide the City with a set of lighting standards and provisions.

**3.6 Glossary, Tables and Appendices.** The location and format of some parts of the UDC will depend on the determined UDC Framework (Task 2.2). This would include Definitions, Tables and other miscellaneous items. Sometimes these items will be embedded within a chapter, and sometimes they will be placed in the Appendix. Other miscellaneous items that sometimes end up in Appendices are Design Guidelines/Design Manuals, Tree Lists, Illustrations, and Application Submittal Requirements. Although the location of these items may shift based on the determined UDC framework, we would recommend organization and development of the Appendices and Definitions as a final step in the creation of the UDC.

## Task Four: Text Illustrations

Based on inputs we've received thus far, we would recommend grouping illustrations as an Appendix within the UDC, rather than embedding them in the text of the document. It would be difficult to generate a product that was visually appealing and remain within a reasonable budget if we used embedded illustrations. Therefore we would suggest a compilation of illustrations as an appendix within the document, with hyperlinks to the illustrations embedded within the text. In this way, the user could click on a link and go straight to the relevant illustration in the Appendix, without disrupting the flow of the document itself.

Because the City already has a body of illustrations and drawings, we recommend that the City incorporate existing graphics where possible, and identify key segments of the code where the illustration budget could be best utilized. In that way, we can focus on the most critical elements to address visually at this time. Possible focus areas for illustration are street cross sections, sign standards, setbacks. Another possible use of the illustration budget would be an assortment of graphics to illustrate specific standards that tend to be confusing, where a visual aid would be helpful in communicating the intent of the Code (shared access, parking lot design, street tree placement, etc.). We would not recommend incorporating photos within the UDC, and construction details would probably also not be the best use of the Illustration Budget for this project.

**4.1 Illustration Index and Style Guide.** Once the Framework is determined, we will work with the Client to define the specific illustration style(s) for the project and develop a working Illustration Index. When determining style to be used, we will meet with the Steering Committee to discuss visual preference and key items that need to be illustrated. We will also meet with Staff to ensure that we have access to all existing illustrations that need to be incorporated. The particular styles of graphics will be selected based on visual preference, budget and quantity of illustrations needed (guided by the Illustration Index). Regardless of approach, the final document will have fresh and visually pleasing illustrations that serve as an aid to understanding the UDC. We have produced countless styles of graphics for projects and are comfortable developing anything from CAD linework to custom-rendered Sketch-Up models. See Exhibit E for additional information on illustrations.

**4.2 Phase One Production.** Once the styles are selected and the Illustration Index is developed, we will begin Phase One illustration production. We find that it is helpful to first generate a small batch of illustrations for review. This first batch serves as a type of check step. Once we have a few illustrations, we can look at how they need to be integrated with the text. We also use this batch to make sure that Client and Consultant are sharing a common vision for how the document will look. Minor changes can be made at this point, and style can be refined as the remaining illustrations are produced. After the first batch is approved, we will begin work on the remaining illustrations. We recommend reviewing illustrations in batches, as this makes the review process more manageable. As the batches will correspond with the overall document format, the production timeline for the illustrations will depend on the framework and refined work program for the project. Because Staff will be the primary user of this UDC, and because of the technical nature of the

# EXHIBIT A: SCOPE OF SERVICES

illustrations, it may be more effective to have the Steering Committee defer to Staff for review of the illustrations.

**4.3 Phase Two Production.** Due to the timing of content generation and document review, it will be necessary to continue the production of illustrations in Phase Two. The process for Phase Two production will follow Phase One production, with Staff reviewing illustrations in batches, according to the Index of Illustrations and the style preferences identified in 6.1.

**4.4 Incorporation Into the Deliverable.** Once the text and illustrations are finalized, we will integrate the illustrations into the document according to the approach identified in Task 5.1. We would recommend incorporating illustrations as an Appendix to the Code, with hyperlinks embedded in the text to connect them to the referenced content.

## Task Five: Document Review

Because of the size of the Unified Development Code, we strongly recommend reviewing the product in phases. This phased approach would be organized around the chapters of the UDC, and review sequence for Part Four would follow the production sequence of Part Three. For each chapter, MOSAIC would walk the Steering Committee through the content at a Steering Committee Meeting, and then allow a window of time for written comments from members of the committee, submitted using "Track Changes" in Microsoft Word. Once changes from the Steering Committee are accommodated, we would then submit a draft to City for legal review (again with City Attorney providing comments using "Track Changes"). The final draft coming out of that round of revision would be the draft that would later go forward to Council and Commission for action. We would recommend maintaining the review of each of the chapters as discreet tasks. This is one of the ways to keep the project on schedule. Without this separation, disproportionate time is often given to some elements, which inevitably leads to project delays.

Review of the various chapters will overlap, because of the engagement of different entities through the review process. While one chapter is with the Steering Committee, another chapter will be with the City Attorney, etc. Each chapter will be reviewed by Staff, by the Steering Committee and by the City Attorney. We have included five (5) Steering Committee Meetings for Phase One, spread over a five month period. Legal review typically does not require meetings between the consultant and the City Attorney, and can generally be handled through email or online document sharing. We will work with Staff to identify the preferred approach to Staff review, as there are several different individuals and departments that would be involved.

**5.1 General Provisions.** Roughly 8 weeks is recommended for review of the General Provisions, including one Steering Committee Meeting.

**5.2 Administrative Agents.** It is anticipated that 4 weeks would be needed for review of the Administrative Agents chapter. Administrative Agents would likely be combined with another topic at one of the Steering Committee meetings (either Procedures or General Provisions).

**5.3 Procedures.** About 8 weeks is recommended for review of the Procedures, including one Steering Committee Meeting. Legal review of the Procedures chapter generally requires more time, than other chapters, as this chapter is directly governed by State statutes, and regulates platting (land subdivision), vested rights, variances and other procedures of local governance.

**5.4 Zoning.** About 12 weeks is recommended for review of the Zoning chapter. This would include review of the master use table and the master dimension table, as well as general zoning provisions and standards for particular uses. Because of the level of detail involved in each of these components, two (2) Steering Committee Meetings are recommended for the Zoning chapter.

**5.5 Development Standards.** Roughly 10 weeks is recommended for the review of the Development Standards, as the content will likely be broken out into two parts (land development and site design). Staff review will be more extensive for this chapter, and it would require one (1) Steering Committee meeting.

## EXHIBIT A: SCOPE OF SERVICES

**5.6 Glossary, Tables and Appendices.** It is anticipated that the Glossary, Tables and Appendices would take 8 weeks to review. This is the portion of a Code where there is the most extensive need for cross-checking and reviews for internal consistency. Formatting is also complicated for some of these pieces, so changes take a bit more time. Individual review of these items tends to be quite time-consuming, and the need for group discussion is fairly limited. This chapter would require one (1) Steering Committee Meeting.

### Task Six: UDC Handbook

A Unified Development Code is an exhaustive technical document. A condensed and illustrated version of the UDC content does much to communicate requirements and intent with developers and property owners. For this reason we also recommend the creation of a UDC Handbook. This would be a summary document that condenses key elements of the UDC into a shorter and more accessible document. It is intended to answer high level questions that members of the community would typically have when improving a property, and to communicate the City's vision and expectations for future development. MOSAIC will work with staff to compile all pertinent information into a more accessible document.

**6.1 Frequently Asked Questions and General Departmental Information.** Contact information for various departments, as well as a general description of their role, will be provided in the UDC Handbook, as will a section dedicated to Frequently Asked Questions.

**6.2 Zoning Spec Sheets and a Summary of the Zoning Categories** The zoning requirements for each category will be summarized on a single sheet for quick access. The content would include uses and dimensions, as well as line graphics to illustrate the dimensions. Additionally, a summary of all of the zoning categories in Boerne will also be provided.

**6.3 Process Graphics.** MOSAIC will produce process graphics to illustrate how to navigate the development process, including Permitting, Platting, Zoning Amendments and other pertinent steps that are required to improve a property. Captions will be used to provide any additional pertinent information.

**6.4 Overview of Submittal Requirements.** Information about submittal requirements is also vital for the development process. MOSAIC will include a section dedicated to this topic in the UDC Handbook.

**6.5 Additional Information.** MOSAIC will work with Staff and with the Steering Committee to provide any other information that would aid the development process in Boerne. This would likely include a Quick Reference Guide to commonly referenced sections of the UDC, such as the various sections of the Development Standards.

**6.6 Formatting the Handbook.** The Handbook will be formatted as a bookmarked PDF document, with chapters set in accordance with the sections above. MOSAIC will provide the City with a digital copy of the Handbook, as well as a jpg library of all of the graphics used in the Handbook. The Handbook can be incorporated as an Appendix in the online UDC document, or could be uploaded to the City's website for easy access.

### Task Seven: Engagement and Adoption

Because of the scope of the UDC, it is recommended that orientation to the document be conducted across multiple Council and Commission Meetings. This ensures adequate opportunity to address questions and concerns, so that officials are familiar with the UDC before it comes to them for action. Orientation presentations could either be conducted as a part of a scheduled Public Meeting or as a Workshop or Special Meeting topic, depending on client preference.

We recommend that MOSAIC's participation in public engagement be limited to online content and strategic forms of outreach and communication (developer focus groups, town hall meetings, EDC, Chamber of Commerce, etc).

# EXHIBIT A: SCOPE OF SERVICES

- 7.1 Project Outreach Meetings.** Because of the amount of content that must be generated for this project, it is recommended that consultant participation in the public engagement process be limited to online content and strategic forms of community outreach and communication. This could include developer focus group meetings, town hall meetings, presentations to the EDC or Chamber, or other similar venues and audiences that the Client feels are important. MOSAIC will provide the City with a presentation template (Task 1.5), and will coordinate with the client as a part of general project management (Task 1.2) prior to all scheduled opportunities for public engagement. There will be four (4) outreach meetings throughout the project, two per phase.
- 7.2 Web Content Generation.** Online communications are an effective means of community outreach, particularly for projects such as this. To facilitate communication of progress and content with the Boerne community, MOSAIC will provide content for the City's website periodically through the project process, according to the timeline set at the Project Kick-Off Meeting (Task 1.3). MOSAIC will also work with staff at that meeting to determine what content should be provided in the web posts. Typical pieces would include a FAQ document, an overview of the UDC, project timeline, progress reports and information about upcoming events. Web content would be provided throughout both phases of the project.
- 7.3 Chapter Orientation: City Council.** Because of the scope of material to be covered, we recommend presentations at multiple City Council meetings for orientation to the new UDC. Toward the beginning of the project process, MOSAIC will make a presentation at a Council Meeting to provide a high level overview of the timeline, approach and general format of the UDC. This would be a general orientation to lay out what can be expected through the project process. We would recommend scheduling this after the Framework is determined (Task 2.2). Once all modifications have been made, based on Staff, Steering Committee and Attorney review, MOSAIC will make a high-level presentation to City Council about each of the individual chapters. There would be five (5) Council Orientation presentations. The goal is to complete all orientation presentations by the end of Phase One, but this will depend on scheduling and Council preference.
- 7.4 Chapter Orientation: Planning and Zoning Commission.** As with the presentations to Council, MOSAIC recommends five (5) Orientation Presentations to Planning and Zoning Commission. The first would be a an overview of the project. The remaining presentations would cover UDC content by chapter, at a high level. The goal is to complete all of these presentations by the end of Phase One as well.
- 7.5 UDC Adoption Hearings.** As Council and Commission will have already been familiarized with the content of the UDC, the Code will be presented in its entirety for adoption in a series of public hearings before the City Council and Planning and Zoning Commission. This would normally include a workshop presentation with public hearing, and then a second meeting where action is to be taken.
- 7.6 Orientation to the UDC Handbook.** The Handbook is to be a high level, graphically enriched summary of the Code, helping to communicate content as well as intent. It will be important for Council and Commission to be familiar with it. MOSAIC recommends two presentations pertaining to the Handbook: one at a Council Meeting (or workshop), and one at a P&Z Meeting (or workshop). These would occur as a final step in the project process, once all materials have been completed.

## EXHIBIT B: TIMELINE

		PHASE ONE								PHASE TWO						
		FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	
TASK 1: PROJECT OVERSIGHT																
1.1	Monthly Project Update Memos															
1.2	Project Management															
1.3	Project Kick-Off/Work Program															
1.4	Staff Interview Guide															
1.5	Presentation Template															
1.6	Steering Committee Gen. Mtgs															
1.7	Final Prints											✦				
TASK 2: FRAMEWORK AND FORMATTING																
2.1	Internal Document Review															
2.2	UDC Framework & Working Outline															
2.3	Formatting for Online Publishing											✦				
TASK 3: EDITS AND CONTENT																
3.1	General Provisions															
3.2	Administrative Agents															
3.3	Procedures															
3.4	Zoning and Zoning Map															
3.5	Development Standards															
3.6	Glossary, Tables & Appendices															
TASK 4: ILLUSTRATIONS																
4.1	Illustration Index and Style Guide															
4.2	Phase One Production															
4.3	Phase Two Production															
4.4	Incorporation Into Deliverable															
TASK 5: DOCUMENT REVIEW																
5.1	General Provisions															
5.2	Administrative Agents															
5.3	Procedures															
5.4	Zoning															
5.5	Development Standards															
5.6	Glossary, Tables & Appendices															
TASK 6: UDC HANDBOOK																
6.1	FAQs/Departmental Information															
6.2	Zoning Information															
6.3	Process Graphics															
6.4	Submittal Requirements															
6.5	Additional Information															
6.6	Formatting the Handbook														✦	
TASK 7: ENGAGEMENT AND ADOPTION																
7.1	Project Outreach Meetings															
7.2	Web Content Generation															
7.3	Chapter Orientation: City Council															
7.4	Chapter Orientation: P&Z															
7.5	UDC Adoption Hearings										✦					
7.6	Orientation to the UDC Handbook														✦	



### Targets for Final Products

- UDC Adoption
- Print and online publication
- Handbook completed
- Handbook Orientation

### Summary of Meetings

- 11 Steering Committee Meetings
- 8 City Council Meetings
- 7 P&Z Meetings
- 4 Project Outreach Meetings

## EXHIBIT C: COST OF SERVICES

	PHASE ONE COSTS FY 2018-2019		PHASE TWO COSTS FY 2019-2020	
	By Task	Sub-task	By Task	Sub-task
<b>TASK 1: PROJECT OVERSIGHT</b>	<b>\$ 13,650</b>		<b>\$ 7,200</b>	
1.1 Monthly Project Update Memos		\$ 1,050		\$ 900
1.2 Project Management		\$ 4,500		\$ 3,000
1.3 Project Kick-Off/Refined Program		\$ 3,000		\$ -
1.4 Staff Interview Guide		\$ 1,200		\$ -
1.5 Presentation Template		\$ 1,500		\$ -
1.6 Steering Committee Meetings		\$ 2,400		\$ 2,400
1.7 Final Prints		\$ -		\$ 900
<b>TASK 2: FRAMEWORK AND FORMATTING</b>	<b>\$ 4,500</b>		<b>\$ 3,900</b>	
2.1 Internal Document Review		\$ 3,300		\$ -
2.2 UDC Framework/Guiding Format		\$ 1,200		\$ -
2.3 Formatting for Online Publishing		\$ -		\$ 3,900
<b>TASK 3: EDITS AND CONTENT</b>	<b>\$ 58,650</b>		<b>\$ -</b>	
3.1 General Provisions		\$ 3,900		\$ -
3.2 Administrative Agents		\$ 1,850		\$ -
3.3 Procedures		\$ 5,400		\$ -
3.4 Zoning and Zoning Map		\$ 16,200		\$ -
3.5 Development Standards		\$ 25,500		\$ -
3.6 Glossary, Tables, Appendices		\$ 5,800		\$ -
<b>TASK 4: ILLUSTRATIONS</b>	<b>\$ 18,000</b>		<b>\$ 8,100</b>	
4.1 Illustration Index and Style Guide		\$ 2,700		\$ -
4.2 Phase One Production		\$ 15,300		\$ -
4.3 Phase Two Production		\$ -		\$ 6,600
4.4 Incorporation Into the UDC		\$ -		\$ 1,500
<b>TASK 5: DOCUMENT REVIEW</b>	<b>\$ 22,200</b>		<b>\$ -</b>	
5.1 General Provisions		\$ 1,800		\$ -
5.2 Administrative Agents		\$ 900		\$ -
5.3 Procedures		\$ 3,000		\$ -
5.4 Zoning		\$ 6,300		\$ -
5.5 Development Standards		\$ 6,000		\$ -
5.6 Glossary, Tables and Appendices		\$ 4,200		\$ -
<b>TASK 6: UDC HANDBOOK</b>	<b>\$ -</b>		<b>\$ 26,700</b>	
6.1 FAQs/Departmental Information		\$ -		\$ 2,400
6.2 Zoning Information		\$ -		\$ 13,050
6.3 Process Graphics		\$ -		\$ 3,900
6.4 Submittal Requirements		\$ -		\$ 2,700
6.5 Additional Information		\$ -		\$ 1,950
6.6 Formatting the Handbook		\$ -		\$ 2,700
<b>TASK 7: ENGAGEMENT AND ADOPTION</b>	<b>\$ 8,400</b>		<b>\$ 6,000</b>	
7.1 Project Outreach Meetings		\$ 1,200		\$ 1,200
7.2 Web Content Generation		\$ 1,200		\$ 600
7.3 Chapter Orientation: Council		\$ 3,000		\$ -
7.4 Chapter Orientation : P&Z		\$ 3,000		\$ -
7.5 UDC Adoption Hearings		\$ -		\$ 3,000
7.6 Orientation to the UDC Handbook		\$ -		\$ 1,200
	<b>\$ 125,400</b>		<b>\$ 51,900</b>	

PHASE ONE COST \$ 125,400  
 PHASE TWO COST \$ 51,900  
**TOTAL PROJECT COST \$ 177,300**

# EXHIBIT D: SUMMARY OF DELIVERABLES

The following is a summary of the deliverables associated with the project. The deliverables are organized by Project Phase, then broken out by task. MOSAIC maintains a cloud server for document sharing with clients. We will set up a shared folder with the City at project outset for all documents and digital products identified here.

## PHASE ONE DELIVERABLES (FY 2018-2019)

### Task One

- Seven (7) monthly project update memos, submitted with monthly invoices (Task 1.1)
- Staff Interview Guide (Task 1.4) document
- Refined Work Program document, resulting from 1.3 Project Kick-Off meeting
- PowerPoint presentation template (Task 1.5)

### Task Two

- Memo that provides the guiding UDC framework/format (Task 2.2)

### Task Three

*The exact chapters of the Boerne UDC may be refined based on inputs in Tasks One and Two, but the general chapter breakdown will be:*

- Chapter One: General Provisions (digital draft copy, in MS Word format)
- Chapter Two: Procedures (digital draft copy, in MS Word format)
- Chapter Three: Zoning (digital draft copy, in MS Word format)
- Chapter Four: Development Standards (digital draft copy, in MS Word format)
- Glossary, Tables and Appendices (digital draft copy, in MS Word format)
- Zoning Map Amendment Support. In addition to the draft chapters of the UDC, MOSAIC will provide zoning map amendment support information, including an Assignment Criteria Matrix (this is a tool that Staff will use in amending the zoning map). City staff will generate the updated zoning map.
- Lighting Standards and Provisions. MOSAIC will provide one draft and one final digital copy of the new lighting standards and provisions that will be included in the UDC. The draft will be reviewed by staff before inserting into the Chapter Four: Development Standards (above).

### Task Four

- Illustration Index and Style Guide summary document (Task 6.1)
- Digital package of Phase One Illustrations, in JPEG format (Task 4.2)

### Task Five

- A final, revised version of each of the chapters in Task Three will be provided as the final deliverables for Task Five. The revised version will be based on inputs from reviewing agents (Steering Committee, Staff, and City Attorney).

### Task Seven

- Five (5) PowerPoint presentations for a high-level summary of UDC content, for use with Task 7.3.
- Content for use on the City website as a means of communicating project progress and content generated (Task 7.2). There will be approximately six (6) rounds of web postings during Phase One.



# EXHIBIT D: SUMMARY OF DELIVERABLES

## PHASE TWO DELIVERABLES (FY 2019-2020)

### Task One

- Six (6) monthly project update memos, submitted with monthly invoices (Task 1.1)
- Four (4) Steering Committee Meetings (Task 1.6)
- One (1) digital copy of the final UDC document, in bookmarked PDF format, including illustrations (Task 1.7)
- Twenty-five (25) copies of the final UDC document, printed and packaged in 3-ring binders, including illustrations (Task 1.7)

### Task Two

- Final UDC document formatted for online publishing with Municode (Task 2.3), including illustrations

### Task Three

*none*

### Task Four

- Digital package of Phase Two Illustrations, in JPEG format (Task 4.3)

### Task Five

*none*

### Task Six

- Draft versions of each section of the handbook for Staff review, as digital files in MS Word format
- One (1) final copy of the UDC handbook in digital form, as a bookmarked PDF document
- Twenty-five (25) copies of the UDC Handbook document, printed and bound

### Task Seven

- Content for use on the City website as a means of communicating project progress and content generated (Task 7.2). There will be approximately six (6) rounds of web postings during Phase One.
- Five (5) PowerPoint presentations for a high-level summary of UDC content, for use with Tasks 7.3. and 7.4 (Council and P&Z Orientation)
- One (1) PowerPoint presentation for use during the UDC adoption process (Task 7.5)
- One (1) PowerPoint presentation for use at the UDC Handbook Orientation presentation to Council and P&Z.

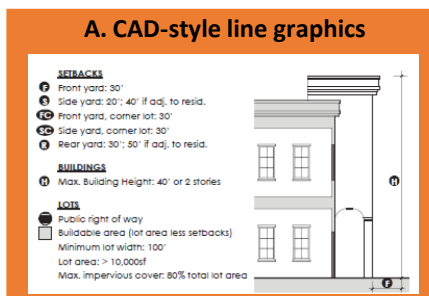
## EXHIBIT E : ILLUSTRATIONS

Illustrations of design standards are a major component of this project. Because there is such a variety in terms of style and level of detail in urban design illustrations, we find it helpful to work from an Index of Illustrations during the project process. MOSAIC produces a very broad range of graphics, and we have found that a comprehensive project such as the UDC will require multiple styles in order to adequately communicate content.

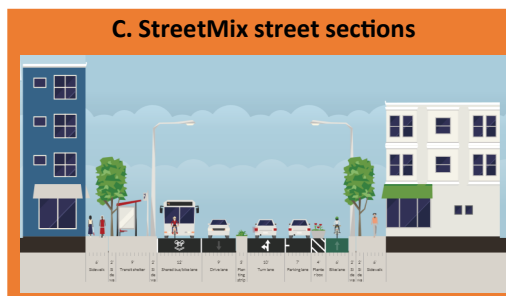
After we complete the Internal Document Review (Task 2.1), we will be more familiar with the gaps that existing in the current development regulations. And after the Framework for the UDC is developed (2.2), we can begin identifying locations in the Code where illustrations will be most effective.

Before we begin drafting illustrations, we will coordinate with the Client to determine visual preferences related to style of illustration. This type of collaboration at the outset helps to make the production process more efficient, and aids in communication of vision and expectation. These two items, the Illustrations Index and the Project Style Guide, will be used to determine the actual quantity and type of illustrations to be used.

The examples below are intended to provide an approximation of cost for each style. These figures are estimates only, as the actual cost of illustrations depends level of detail and other factors that we will determine together (Task 4.1). Working with the budget and timeline that has been set for this project, and recalling the graphic work that already exists for the City, we would recommend illustration types A, B, and C below. Using these examples, we would anticipate 20-25 illustrations, in addition to the zoning spec sheets and process graphics created for the UDC handbook. This is a very rough estimate, however, as we have no production parameters at this time., nor have we had opportunity to identify existing graphics and the type of gaps that need to be filled.



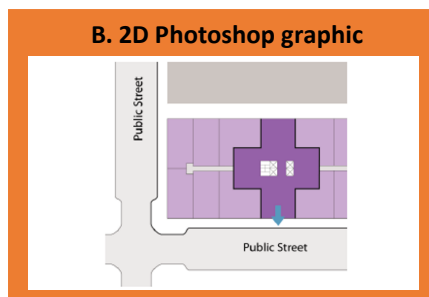
Est. Unit Cost  
\$500-\$1000



Est. Unit Cost  
\$500-\$800



Est. Unit Cost  
\$1200-\$1600



Est. Unit Cost  
\$900-\$1200



Est. Unit Cost  
\$1200-\$1800



Est. Unit Cost  
\$1800+

## EXHIBIT F: WORKLOAD AND AVAILABILITY

### TEAM SIZE

Many firms pass off tasks to less-qualified individuals once under contract, because their business model is built around a tiered production structure, with general staff, project managers and senior level personnel all billing against a project, whether or not that project warrants a higher dedicated personnel load. MOSAIC's business model was specifically developed because we have seen the way this redundancy negatively impacts quality of product and inflates project cost. On MOSAIC projects, the key personnel identified in the contract are the people that will actually be doing the work. This is how we ensure quality of services and provide our clients with an exceptional product at a reasonable cost. *There isn't another firm that can offer this*, and it is because of our business model.

MOSAIC often teams with other consultants, but it is based on the needs of a particular project. Comprehensive plans, for example, require a larger team due to the diverse nature of the deliverables and content to be covered (GIS maps, demographic analysis, stormwater management, web hosting, community outreach, etc.). Codes and ordinances benefit from a smaller team size, to avoid variation in style, tone and approach to the writing. Additionally, the more writers that are assigned to a project of this nature, the more extensive the level of review that is needed (and therefore the higher the production cost). We are quite frequently invited to team with the larger national planning and engineering firms, due to our niche area of expertise and our reputation in the areas of land use planning and development codes. We also have experience teaming with local consultants in professional fields such as PR/media relations, civil engineering, architecture and historic preservation. After a detailed review of the professional skills required for this project, and the availability of key personnel, we have elected to keep a small staff size, as this work scope doesn't contain components such as engineered drawings or architecturally sealed drawings.

### KEY PERSONNEL

A summary of project commitments of key personnel is provided below. We identified project personnel based on the scope of services requested. MOSAIC is built on an agile management platform, meaning that subcontractors are retained on an as-needed basis where capacity is required, typically to assist with technical writing, graphic design, public engagement, and website development. We feel that addition of extra personnel at this time would unnecessarily inflate the project budget and draw out the project timeline.

We maintain percentages of billable hours that are comparable with those of our competitors. Should unforeseen circumstances beyond our control occur, we will modify the assigned personnel per City's approval, either through internal staff changes or by subcontracting work to other consulting firms. Changes to assigned personnel will always be first approved by the City.

	PHASE ONE		PHASE TWO	
	Feb - Sep 2019		Oct 2019 - Mar 2020	
	<i>Principal</i>	<i>Sr. Planner</i>	<i>Principal</i>	<i>Sr. Planner</i>
<b>BOERNE UDC</b>				
<b>Total Hours by Phase</b>	405	498	145	407
<b>Average Hours per Month</b>	54	66	24	68
<b>Boerne % Billable Time per Month</b>	<b>32%</b>	<b>40%</b>	<b>14%</b>	<b>41%</b>
VIA % time per month *	max 12%	max 8%	max 25%	max 25% *
City of San Antonio % time per month***	19%	0%	19%	0% ***
<b>Max time commitments</b>	<b>63%</b>	<b>48%</b>	<b>58%</b>	<b>66%</b>

\*MOSAIC is only obligated under our current contract with VIA through March 31, 2019. VIA will re-issue/re-scope for all work past that date, should they choose to continue working with us. They never retain us for more than 25% billable time.

\*\*\*Our current contract with the City of San Antonio runs through June of 2020.

# EXHIBIT G: CURRENT CONTRACTUAL COMMITMENTS

MOSAIC is currently under contract for professional planning services with the City of San Antonio and with VIA Metropolitan Transit Agency. A summary of our commitments and a project point of contact has been included below.

## SAN ANTONIO SUB-AREA PLANS

Project Point of Contact: Chris Ryerson  
City of San Antonio  
Planning Administrator  
(210) 207-7833  
Chris.Ryerson@sanantonio.gov

### Responsibilities:

MOSAIC is part of a team of consulting firms developing sub-area plans for the City of San Antonio. SA Tomorrow, the City's comprehensive plan, called for master planning to be conducted at a smaller scale, rather than a single, city-wide effort. Our team is now on our second phase of sub-area plans, and MOSAIC's responsibilities include land use planning for each sub-area and recommendations related to re-zoning once the plans are adopted.; We are developing six plans under the current phase. MIG is the prime contractor, and other team members include Cambridge Systematics, EPS, and Ximenez and Associates.

Our current contract with the City of San Antonio runs through June of 2020.

Assigned Personnel: Carissa Cox at 19% monthly billable time

## VIA METROPOLITAN TRANSIT AGENCY: STATION AREA AND CORRIDOR PLANNING

Project Point of Contact: Christine Vina  
VIA Metropolitan Transit Agency  
Strategic Planning and Project Development  
(210) 299-5907  
christine.vina@viainfo.net

### Responsibilities:

MOSAIC is part of a very large team of consultants providing ongoing services to VIA related to long range transportation planning. MOSAIC's role on the team is to provide land use and planning support services related to zoning and development regulations. The prime contracting firm on this project is Cambridge Systematics, and other team members include Fregonese and Associates, Perkins Eastman, MIG and EPS.

During this contract period MOSAIC has developed Urban Design Guidelines for VIA, as a communications tool to use with municipalities in their service area. MOSAIC is only obligated under our current contract with VIA through March 31, 2019, and as of now we have no task assigned to us. VIA has indicated an interest in continuing to work with MOSAIC, but they will be re-issuing an RFP for all work beyond March of this year. Should they choose to continue to work with us, we would negotiate services at that time. They have never retained us for more than 25% billable time per employee.

Assigned Personnel:	Carissa Cox	pending, tbd (max of 25%)
	Eli Pearson	pending, tbd (max of 25%)



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/7/2019

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

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

<b>PRODUCER</b> Higginbotham Insurance Agency, Inc. 1826 N Loop 1604 W, Suite 375 San Antonio TX 78248		<b>CONTACT NAME:</b> Kris Spaeth <b>PHONE (A/C, No, Ext):</b> 210-971-5051 <b>E-MAIL ADDRESS:</b> kspaeth@higginbotham.net		<b>FAX (A/C, No):</b> 210-979-7474
		<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
		INSURER A : Hanover Insurance Company		22292
<b>INSURED</b> MOSAIC Planning & Development Services, Inc. 18756 Stone Oak Parkway San Antonio TX 78256		INSURER B :		
		INSURER C :		
		INSURER D :		
		INSURER E :		
		INSURER F :		

**COVERAGES****CERTIFICATE NUMBER:** 1024451104**REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			OHD981001206	12/28/2018	12/28/2019	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			OHD981001206	12/28/2018	12/28/2019	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y / N <input checked="" type="checkbox"/> N / A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			LHDA83995603	2/3/2018	2/3/2019	Each Claim Limit \$1,000,000 Aggregate Limit \$1,000,000

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

Professional Liability coverage is written on a claims made basis with a retro active date of 2/3/2016.

**CERTIFICATE HOLDER****CANCELLATION**

For Information Purposes

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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