

COACHELLA RETAIL
CANNABIS LICENSING
**PROJECT
PROPOSAL**



**LICENSING
OVERSIGHT**

**PROPOSED
BY CANNABIZ
CONSULTING
GROUP**



STATEMENT OF INTEREST

PREPARED BY
CHRISTOPHER
MARTINEZ

We thank you for the opportunity to submit this proposal for cannabis licensing monitoring and oversight services. CannaBiz has established itself as a reliable local cannabis consultant within the Coachella Valley and has served several clients in Southern California that includes, Cathedral City, Desert Hot Springs, Chula Vista, Los Angeles, and the City of Coachella. We look forward to working with Coachella to implement the second round of retail cannabis licensing. Having gone through numerous licensing programs in different jurisdictions, we are prepared to assist your city with establishing a strong merit based application program that is comprehensive and cohesive. We hope to build a strong relationship with the City of Coachella through this process.

Why Us?

Experience and honest guidance is key to being successful in this field. That is why we pride ourselves on the team we have assembled, which sets us apart from the competition. Our members of the CannaBiz Board of Professionals come from various sides of traditional business to help guide you to your goal. As your consultant, our goal will be to help you establish a transparent program that will give your applicants



and city staff the confidence that their application is not subject to prejudice or a faulty process. The CannaBiz Board of Professionals has over 50 years of accumulated professionalism and success in businesses that closely resemble the cannabis industry. Additionally, the three individuals we have ready to take on this project have an accumulation of over 15 years experience within the cannabis industry. We want to give you the time and guidance that you, your constituents, and applicants deserve. Together we'll create and refine your plan for a successful second round launch of the City's cannabis retail application program. We look forward to working with the City of Coachella.



QUALIFICATIONS

Through our work in the cannabis industry, CannaBiz has taken a vital role in construction oversight, establishing compliant and effective procedures, and license procurement for multiple corporate cannabis facilities in Southern California. Our experience in the industry has exposed us to a myriad of demands and responsibilities associated with managing the construction of a facility from the ground up and acquiring all the necessary licenses to begin operations. We are familiar with a multitude of cannabis application programs and are able to recognize, anticipate, and resolve potential issues with minimal impact to ensure deadlines are met. The range of our experience and work in California includes but is not limited to:

- Writing multiple city, county and state, certifications, licenses, conditional use permits, and approvals required by planning departments;
 - Writing standard operating procedures in compliance with local and state regulations;
 - Writing security procedures for premise, inventory, and public safety;
 - Writing track and trace and waste management procedures;
 - Establishing compliant packaging, labeling, and marketing procedures;
 - Establishing procedures to meet strict and extensive audit and record keeping requirements;
 - Establishing procedures to meet state license regulations as they pertain to each commercial activity;
 - Compliance oversight of a cultivation, manufacturing, and distribution facility;
 - Applying and obtaining city cannabis permits;
 - Applying and obtaining state cannabis licenses;
 - Represent clients at planning and city council meetings;
 - Successfully lobby for reduced fees and taxes on cannabis operations; and
 - Human Resource practices.
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OUR TEAM

Christopher Martinez is a Coachella Valley local and obtained his bachelor's in political science with a focus in law from the University of California Riverside. His cannabis experience has come entirely from a regulatory and compliance standpoint. Chris has been engaged with the state's various drafts of regulations from 2017 to the currently adopted regulations. He has helped companies obtain licenses from their local government and positioned them to receive their state licenses. His work has also involved establishing compliant procedures to avoid violating the local and state regulations. Compliant procedures are key to maintaining a healthy and successful cannabis operation. Chris has developed standard operating procedures, employee manuals, and security manuals for cannabis cultivators, manufacturers, distributors, and retailers. His work glues cannabis operations with compliance to guide a cannabis company towards success.

Oscar Ortiz is also a Coachella Valley local and obtained a bachelor's in chemistry from Stanford University. He has worked and operated in the California Cannabis Industry within the manufacturing sector since 2013. Throughout his experience in the industry, he has learned firsthand which can make a company thrive in the industry, and which practices can pose a risk to employees and company profits. Utilizing his chemistry degree, Oscar has worked on blending custom formulations of cannabinoids and terpenes to produce topicals, edibles, and other THC concentrated products. Oscar's early work involved the testing of various medical marijuana products for potency, bacteria, pesticides, and residual solvents. Cannabis manufacturing is one of the most stringently regulated operations with various record keeping requirements and data analysis. Oscar has also taken a vital role in implementing new tracking procedures to optimize production while maintaining operation compliance.

Simon Watson Simon has owned and worked for cannabis-specific companies since 2012. He has managed and designed over 258,000 square feet of cannabis indoor and outdoor production all within the previous five years. Simon has also specialized in the design and operations of a wide range of facilities, from multi-million-dollar constructions to cost-effective wholesale field production. He has first hand knowledge and experience on what a cannabis operation in their building to maintain a safe and compliant working environment. When given the opportunity to work on a client's project, Simon makes it his mission to save them from costly financial mistakes that are commonly made in the cannabis industry. Some of his previous clients include Double Delicious Farms, American Farms, Vets Leaf, Inc., and is currently the Manager of Operations at Coachella Labs. Simon experience from of running highly regulated cannabis companies in Washington and California brings the knowledge of what it takes to start and operate a successful cannabis business.

HOW WE GET IT DONE

RETAIL CANNABIS APPLICATION PROGRAM

This project can be broken down into two phases. Phase 1 will be the actual framework surrounding the application process. This involves creating scoring criteria that meets the direction of City Council and provides a comprehensive scoring rubric. Additionally, we will prepare for potential appeals by establishing the procedures of conduct ahead of time so applicants have the opportunity to address concerns about their final score. By no means do we expect to reach an appeals hearing, but our team will be ready in the event one is required. Phase two consists of the actual roll out of the application program. This phase includes public engagement, coordination with city staff, and ongoing assistance. This entire process gives Coachella the opportunity to attract the most qualified operators in accordance to the scoring criteria.

THE OBJECTIVE

Our overall objective will be to give all parties involved the confidence that the application program is transparent and fair. Additionally, we want to tailor this program to meet the vision of City Council and their constituents. Together, we can implement a licensing program that will bring the best fitting operators to the city of Coachella.



PLAN, EXECUTE & SUCCEED

Consulting

We are prepared to work with city staff from the beginning to the end of the entire round two licensing program. Once this process is complete, the City of Coachella will have a strong program to implement additional licensing rounds, as needed. And, CannaBiz will be ready should the City need further assistance.

SCOPE OF WORK

RETAIL ROUND TWO

Application and Appeals Program

- 1) City of Coachella merit based application program and appeals.
 - Assist city in preparing the scoring criteria and sheet
 - Organizing a public workshop for all interested parties
 - Establish internet portal for applicant:
 - Communication on behalf of the City;
 - Materials submitted, and maintaining regular;
 - Important notifications and deadlines
- 2) Coordination with City Staff
 - Attend one staff meeting and
 - Provide staff with the draft “Completeness Review”
 - Draft and send out “incomplete letters if necessary
- 3) Coordination with Cannabis Review Committee
 - Organize copies of materials for review by the committee,
 - Conduct ranking process with the committee members
 - Conduct site visits,
 - Engage in detailed discussions about each project, and
 - Incorporate cannabis committee members' notes with ranking scores for transparency.
- 4) Final Scoring Sheet
 - Prepare the final scoring sheets for each applicant
 - Prepare and provide ranking sheet for all interested parties in accordance to committee scores
- 5) Ongoing Assistance

Assist staff with other assignments or meetings as needed, to finalize the retail cannabis reviews on a time/material basis.
- 6) Appeals
 - A) Provide assistance with establishing appeals procedures
 - B) Draft notification of appeals statute of limitation
 - Attend the Appeals Committee hearings as expert witness and provide assistance

*Completeness review: Reviewing submittal to check if all Planning Application and Cannabis Regulatory Permit submittal requirements have been met and prepare draft “incomplete letters” as needed. This includes deficiency items based on the prioritization criteria approved by the City Council.

PROPOSED FEES AND REFERRALS

PLEASE CONSIDER THE BELOW PROPOSED FEES:

Option 1:

Services included in the scope of work numbered 1-6A
\$22,00.00

Services included in scope of work numbered 6B for the appeals process
\$3,000.00

**City may also opt for an hourly rate through appeals
process oppose to the above fee*

Option 2:

Hourly Rate Options

Senior Consultant
\$200.00

Project Manager
\$125.00

Project Assistant
\$75.00

Not to exceed a total of \$25,000.00

Referrals

Charles Pfeifer
CEO of We Care Cat City, Inc
charles@guidegroups.com

Vince Palmieri
COO at Vets Leaf, Inc.
vince@vetsleaf.com

Kelly Burtzloff
CEO at Coachella Labs, LLC
kelly@coachellalabs.com

***Phone numbers available upon request**

CITY OF COACHELLA CANNABIS LICENSING ROUND TWO

**OUR PROPOSED SERVICES ARE
INTENDED TO GIVE THE CITY GUIDANCE
ON IMPLEMENTING A TAILORED AND
FAIR LICENSING PROGRAM**

We greatly appreciate the opportunity to provide this proposal to the City of Coachella and look forward to your consideration."

Kindest Regards,



Christopher Masterson

